

PHI SIGMA PI
NATIONAL HONOR FRATERNITY



Officer Training Manual: Recruitment/Initiate Advisor



TABLE OF CONTENTS

Welcome.....	3
Mission.....	3
The Tripod	4
National Office Overview.....	5
Contact the National Office.....	7
Chapter Organizational Chart	7
Tips for becoming a successful Chapter Recruitment/Initiate Advisor	8
Understanding Your Leadership Strengths	8
How to Motivate and Involve People	8
Striking a Balance Between Scholarship, Leadership and Fellowship	9
Communication is the Key	9
Team Building	10
Delegate Tasks to People Who Want to Do Them	11
Officers Must Be Organized and Enthusiastic	13
The Chapter Business Meeting.....	13
Key Responsibilities	13
Recruitment Advisor Specific Responsibilities	14
Initiate Advisor’s Specific Responsibilities	15
Overcoming Challenges.....	17
Audiences.....	18
Recruitment/Initiate Advisor Checklist.....	20
Chapter Standards of Excellence.....	20
Recruitment 365	21
What’s Due When Administratively.....	22
<i>Semester Schools</i>	22
<i>Quarter Schools</i>	22
Step by Step Guide to Recruitment and Initiation	23
Planning for Invitational Meetings	23
When to Hold Invitational Meetings	25
The Ideal Number to Ensure Chapter Stability.....	27
Recruitment Themes.....	30
Chapter Swag for Invitational Nights	31
Potential Member Information Sheet.....	32
Chapter Member Review	33



The Potential New Member Mentality.....	35
Common Objections to Joining an Organization.....	36
SURGE	39
Advertising and Public Relations.....	40
Good Public Relations.....	45
Invitational Meeting	46
Invitational Meeting Schedule	48
Recruitment Event Schedule.....	50
Promoting Phi Sigma Pi	52
Selection of Prospective Members	57
Member Responsibilities	59
The Role of the Initiate.....	61
The Big Brother Program.....	65
Phi Sigma Pi’s Stance Against Hazing.....	68
The Initiation Program	73
Involving the Initiates in Chapter Meetings	77
Evaluating, Voting and Policies.....	79
The Ritual: Formal Induction Ceremony.....	83
What is <i>The Ritual</i> ?	83
Reviewing the Program’s Effectiveness	85
Change: The Initiate Advisor's Toughest Job.....	87
Policies and Procedures	88
National Constitution	88
National Risk Management Policy.....	89
National Operating Policies.....	89
Initiate Bill of Rights.....	89
Amnesty Program.....	90
Return Check Policy.....	90
Chapter Bylaws	90
Chapter Operating Policies	91
Chapter Risk Management Policy.....	91
Phi Sigma Pi Vocabulary/Lingo	91
Additional Resources	97

WELCOME

Congratulations on being elected as Chapter Recruitment/Initiate Advisor! The Membership elected you and has put their trust in you to invite and train your Chapter's future leaders. The campus administrators, the Alumni Members and National Office will look to you as the main representatives. 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 The Officer Installation Ceremony in *The Ceremonies and Ritual* book. This passage describes the importance of the position and role as Initiate Advisor.

"As Chapter Initiate Advisor, your job is to provide for the future. In your hands is placed the responsibility to find and to train the next generation of our Fraternity. You are the teacher, friend and disciplinarian of these future Brothers; but above all, you are the builder of tomorrow for this Chapter. Uphold your duties well and ensure that your Chapter is on the road to security and stability."

Mission

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

Phi Sigma Pi is committed to being a diverse, inclusive and equitable organization as we improve humanity with honor.

It is the role of Phi Sigma Pi Members and Initiates to continue to commit by actively learning, collaborating and implementing policies and practices that lead to cultural competency. By doing so, we are acknowledging the importance of being diverse, equitable and inclusive (DEI). In order to continue the conversation, deliver educational materials and provide resources, we offer actionable items and resources for Members and Chapters. Begin your journey by heading to learn.phisigmapi.org/dei to find these items.

The Tripod



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

Scholarship: As an honor organization, we expect the 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 the organization expands outside the classroom and is part of a larger “always learning” philosophy. The 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 organization 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 the communities. The Chapters support the 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

The purpose of Phi Sigma Pi is an Honor organization for students at 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 organization has its 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, 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.

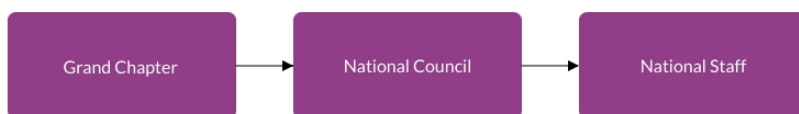
With that, the National Office is designed to support your chartered Chapter to uphold the mission and purpose. To do that the National Office provides the foundational structure.

The Grand Chapter is the supreme legislative body of the organization 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 during Grand Chapter Business at National Convention. This is the time when amendments to the National

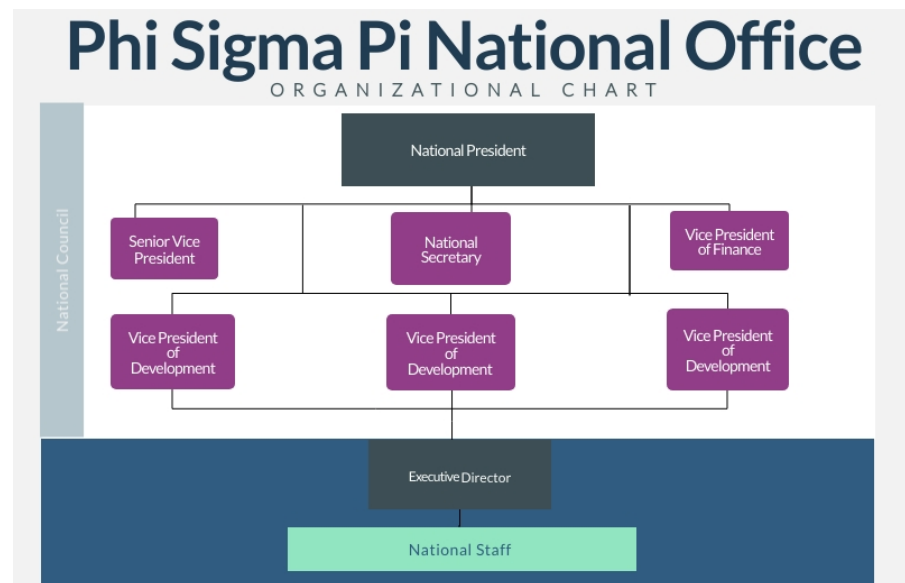
Phi Sigma Pi

Governance



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 the organization 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.

The supreme executive and administrative body of the National organization is the National Council. [The National Council](#) is made up of seven volunteer positions. The National Officers are elected by the Grand Chapter at every two National Conventions. 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 organization through strategic planning.



The National Council employs full-time professionals to assist in the administrative affairs of the organization, 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>

TikTok: <https://www.tiktok.com/@phisigmapi>

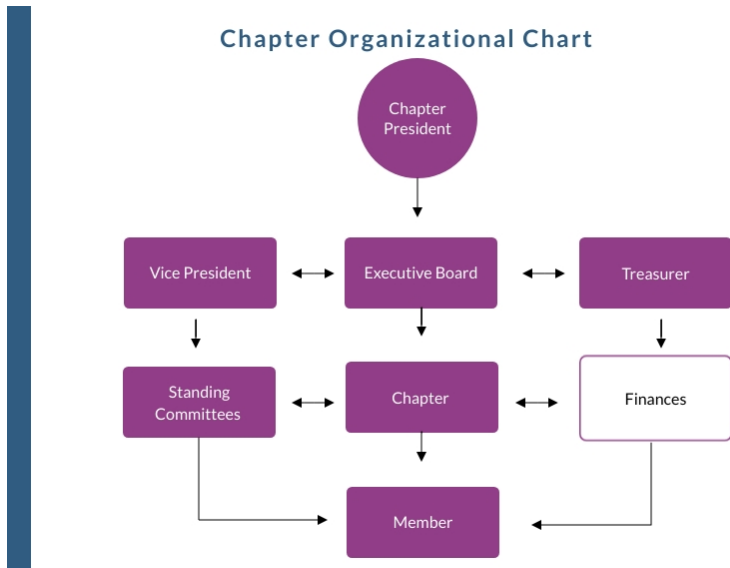
YouTube: <https://youtube.com/user/PhiSigmaPi>

Individual National Staff contact information is [available online](#)

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

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 RECRUITMENT/INITIATE ADVISOR

Understanding Your Leadership Strengths

When serving as a leader, especially the Chapter Recruitment/Initiate Advisor, 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 Recruitment/Initiate Advisor, you request information.



The Art Of Effective Communication



First-Time Officer

***Check out the different LiA Modules on CORE!*

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 organization 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 organization functions will keep them accountable to participate. Get into the habit of planning and using group text, email distribution lists and reminder notifications. It is also a good practice to use a whiteboard/PowerPoint

presentation at all meetings, post in a Google calendar and verbally remind Members of important information.

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



Improve your skills with Leadership in Action Modules:

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

Team Building

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

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

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

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

Delegate Tasks to People Who Want to Do Them

The Chapter Recruitment/Initiate Advisor is entrusted by the Membership with the responsibility for Initiate focused Chapter activities. Although it requires considerable time and effort, your position as Chapter Recruitment/Initiate Advisor 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 organization. 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](#)



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



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



Improve your skills with Leadership in Action Modules:

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

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



Improve your skills with Leadership in Action Modules:

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

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



Improve your skills with Leadership in Action Modules:

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

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



Improve your skills with Leadership in Action Modules:

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

Officers Must Be Organized and Enthusiastic

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

Improve your skills with Leadership in Action Modules:

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



The Chapter Business Meeting

During Chapter Business Meetings it is important to stay on track. During Chapter Meetings discussion should surround Chapter operations, including Chapter events. It is important to make sure events are being planned during summer and winter breaks so that when Members get back to school, they can take off and that your committee is well prepared for recruitment season. It is noted that the Chapter must approve the Initiation program, so you will want to have it planning out in advanced. If you do not have anything planned and approved by the second business meeting, this should become a priority.

Review Chapter Business Meeting resource linked in the Additional Resources section.



KEY RESPONSIBILITIES

This section breaks the recruitment and initiation responsibilities into two positions. Recruitment responsibilities begin with advertising recruitment to the Pinning Ceremony. The Initiation period starts with Pinning and ends with the Induction Ceremony. If your Chapter currently has these responsibilities under one role - that is fine. It is certainly a Chapter choice.

The undergraduates of Phi Sigma Pi are the lifeblood of the organization. For this reason, the fate and future of Phi Sigma Pi partially rests in the hands of the Recruitment/Initiate Advisor. Through this role, each prospective member will gain their first impressions and knowledge base of the organization. The spirit and attitude of the Recruitment Advisor and the Chapter will become the spirit and attitude of the prospective member.

Phi Sigma Pi has placed faith, trust and confidence in every Recruitment Advisor. Each Recruitment Advisor serves as the coordinator/facilitator of the recruitment plan for the Chapter - who's responsible for recruiting all interested new people and introducing them to the responsibilities of being an Initiate as well as a Member.

Recruitment Advisor Specific Responsibilities

1. Responsible for reviewing and updating the Chapter's recruitment program of the Chapter with the assistance of the recruitment committee.
2. Responsible for maintaining and upholding the integrity of the Chapter's recruitment program in relation to the National Constitution, the rules of the sheltering institution, and any rules established by the Chapter with the assistance of the recruitment committee.
3. Plan, organize and coordinate the Chapter's recruiting program, instilling a year-round awareness of its importance as well as implementing specific programs and scheduled activities.
4. Increase the effectiveness of the Chapter's recruitment rather than doing most of the "recruiting" alone.
5. Involve the entire Chapter in recruiting as well as coordinate communications with Potential New Members, recruiting publications, printed material and adherence to organization and campus regulations.
6. Make sure that all students who receive recommendations are contacted and that all Members sending recommendations receive an acknowledgment and notification of the outcome.
7. Emphasize the necessary awareness of academic and financial obligations, information to parents, and the values of organization membership in general as well as specifically in Phi Sigma Pi.

The Recruitment Committee

The recruitment process is a very crucial time for the Chapter. It can become overwhelming and for this reason it is important to utilize the recruitment committee. The Recruitment Advisor must depend upon the advice and assistance of the committee by distributing the work to its Members. Just as with any functional committee, regular meetings and clearly defined responsibilities make for a productive coordinating body. At the committees' first meeting (held at the end of the term prior to the planned Invitational Meetings), a list of responsibilities should be made to clarify its role, such as:

1. Assist the Recruitment Advisor in planning, organizing and designing the Recruitment program.
2. Implement and evaluate the progress of the recruitment program.
3. Aid in advertising for the Invitational Meetings (also known as Info nights).
4. Assist in educating the Membership on proper recruitment techniques through Chapter recruitment workshops.

Initiate Advisor's Specific Responsibilities

The duties of the Initiate Advisor include, but are not necessarily limited to, the following:

1. Plan and implement the Initiation Program approved by the Members of the Chapter at the meeting prior to the first Invitational Meeting held by the Chapter;
2. Establish and guide the Initiation Program to emphasize individual responsibility and motivation in scholastic achievement.
3. Direct and conduct the program based on, and consistent with, Phi Sigma Pi National guidelines and Chapter guidelines on Initiation Programs.
4. Guide the Initiates through a program that instills the ideals of Phi Sigma Pi and the development of pride and commitment through learning, participation, and responsibility.
5. Responsible for preparing the Initiates to become committed, responsible, active Members.
6. Along with the Chapter, ensure that the National Anti-Hazing Policy and all risk management is upheld.
The Initiation Program should be a process of learning, inspiration, cohesiveness and achievement. It should not involve degradation, humiliation or hazing. As Initiate Advisor, you should review the Initiation Program to ensure that membership is achieved in a positive, dignified and constructive manner and that the Chapter's requirements are in agreement with the National Constitution, National Operating Policies, Chapter Bylaws and university/college policies.
7. Work to ensure understanding of, support of, and involvement in the program from Active Chapter Members.
8. Serve as a liaison between the Chapter and the Initiates.
9. Act as the general overseer of Chapter preparations for and conduct of the Formal Induction Ceremony, including being responsible for ensuring that all newly Inducted Members be taught the Fraternal grip and word;

10. Be a voting Member of the Executive Board.

The Initiate Advisor should have complete knowledge of all aspects of the local Chapter and the National organization. The Initiate Advisor must be willing to devote a large amount of time to the Initiates individually, as a group, socially, and with special projects and events. They should become not only their teacher, but also their close friend. In so doing, the attitudes of the Initiate Advisor and ideas about Phi Sigma Pi, other fraternities/sororities and all aspects of the university will be echoed by many of the Initiates. That attitude should encompass a positive approach to all groups, systems and projects.

The Initiation Committee

Selection of the Initiation Committee Members is important. There are several ways to select an Initiation Committee. The choice is left to the Chapter to decide which is the most appropriate.

1. The Initiate Advisor can select from a compiled list of interested members.
2. Nominations for two Members from each year (sophomores, juniors, seniors) to serve on the Initiation Committee can be taken for consideration.

When selecting, it is important to remember that committee members will need to plan and organize the Initiation Program with the Initiate Advisor. They will need to be respected by the other Chapter Members and be very good motivators.

The Initiation Committee Duties

Especially in the case of the large Initiate class, an Initiation Committee is the backbone of the program. The Initiate Advisor must depend upon the advice and assistance of the committee by distributing the work to its Members. Just as with any functional committee, regular meetings and clearly defined responsibilities make for a productive coordinating body. At the committee's first meeting, a list of responsibilities should be made to clarify its role, such as:

1. Assist the Initiate Advisor in planning, organizing and designing the Initiation Program for approval by the active Chapter.
2. Implement and evaluate the progress of the Initiation Program weekly.
3. Meet weekly to evaluate the plan for the upcoming week. Also, discuss any concerns and issues that need to be addressed.
4. Present a written report to the Active Members at each Chapter meeting.

5. Advise and counsel the Initiate Advisor in selection of Big Brothers.
6. Help correct and grade weekly written quizzes.
7. Meet with the Initiate class at least once a week to help solicit the Initiates' ideas and concerns and keep in tune with the thoughts and attitudes of the Initiate class.
8. Meet with the Big Brothers at least twice during the Initiation Program to review their performances and evaluate the effectiveness of the Big Brother Program.
9. Assist the Initiate Advisor with preparations for the Formal Induction Ceremony.
10. Re-evaluate the Initiation Program at the conclusion. Submit written recommendations for improvements to the Chapter for consideration in future Initiation Programs.
11. Assist in the training of future Initiate Advisors.

When you graduate, you are eligible to receive graduation honor cords gifted by The Phi Sigma Pi Foundation! You may wear them during your commencement celebrations as a symbol of your Phi Sigma Pi Membership and dedication to Improve Humanity with Honor through Scholarship, Leadership and Fellowship.

Plus, if you serve as a Chapter Executive Board Officer for at least two academic terms, your graduation cords will be upgraded to recognize your leadership!

OVERCOMING CHALLENGES

Serving as the Recruitment/Initiate Advisor can provide challenges that will impact you as a leader and as a Member. Situations that can create conflict can include:

- Mediating disagreements within the Membership about the Initiation Program
- Ensuring your energy level is high and that you serve as a motivator for all
- Managing and resolving sensitive situations with the Membership and the Initiate Class
- Realizing that it takes the Executive Board, Initiation Committee and the Membership to be successful (one person alone can not do this)
- Needing to be flexible with time and patience. For example, inclement weather canceling events, room reservations being cancelled or the event's timing with other campus activities.

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

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



Improve your skills with Leadership in Action Modules:

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

AUDIENCES

As Recruitment/Initiate Advisor you serve as the spokesperson for the Chapter. With that comes the opportunity to talk and interact with several different "audiences." You will be speaking with individual campus administrators to reserve rooms as well as obtaining the emailing list and requesting marketing opportunities. It will be important to understand who your key audiences are and how to foster those interactions.

Potential New Members

- **Designation** - All undergraduate students.
- **Interactions** - This group is your Chapter's future leaders and Members. Ensuring the correct message and responsibly managing and cultivating these relationships is important.

Initiates

- **Designation** - Students that have agreed to begin the Initiation Program and have gone through the Pinning Ceremony.
- **Interactions** - The Chapter is expected to deliver a well coordinated program that engages the Initiates and has them truly understand what it means to be a Member of Phi Sigma Pi.

Chapter Members

- **Designation** - All undergraduate Members who are in good standing with the Chapter.
- **Interactions** - This is the body that elected you to Chapter Recruitment/Initiate Advisor. Your goal is to lead by example. You should work with the entire Chapter to achieve the goals and vision through the Initiation Program.

Executive Board

- **Designation** - The Executive Board are the elected Officers and most important Committee in the Chapter. According to the National Constitution, that consists of: President, Vice President, Secretary, Treasurer, Historian, Parliamentarian and Initiate Advisor. Your Chapter may have established additional Officer positions.
- **Interactions** - This is your team. As such you are responsible to work with each Officer to assist in achieving their goals and yours.

Area Alumni

- **Designation** - Alumni who may be invested in the Chapter either due to locality or because they are Alumni of the Chapter.
- **Interactions** - Inviting Alumni to Initiate highlighted events is welcomed. During recruitment events it allows PNM's to see that we are a Membership for life. During the Formal Induction Ceremony it is a time for everyone to celebrate a continued legacy.

National Staff Contact

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



**PNM = Potential New Member

Parents

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

RECRUITMENT/INITIATE ADVISOR CHECKLIST

Chapter Standards of Excellence

The Chapter Standards of Excellence (CSE) offers an online evaluation resource to empower Chapters to annually meet the highest standards of Chapter governance, management and mission-driven operations. The Chapter Standards of Excellence consists of 8 Guiding Principles covering over 40 focus areas and benchmarks. Based on the Chapter Standards of Excellence here are a few items that the Chapter Recruitment/Initiate Advisor oversees, but is not limited to,

Chapter Sustainability



- Host Invitational Meetings/Information Sessions (fall and winter/spring)
- Host Recruitment Events (fall and winter/spring)
- Fulfillment of National Initiation Program requirements

All of these items are found in the Chapter Admin Portal (CAP) > CSE > Recruitment/Initiation Planning > Recruitment Form.

Finance & Operations



- Submit new Member information by the due dates (coordinate with Chapter Secretary)

Additionally, each term the Chapter's Recruitment/Initiation Calendar must be uploaded and the Chapter's Initiation Handbook/Manual must also be uploaded. This can be found in the CAP > Chapter Standards of Excellence > Recruitment / Initiation Planning.

For a full review of all Chapter requirements, visit <https://phisigmapi.org/cse>

Recruitment 365

Recruitment should be a part of your Chapter beyond the first few weeks of the term. This is often referred to as Recruitment 365.

When you make Recruitment part of everything you do as a Chapter, you will make progress toward increasing campus visibility/engagement to attract Potential New Members outside of the formal Recruitment period. Following these steps will help you see the fruits of your labor:

The best place to start when seeking partnership with other campus organizations is within your existing network. Work to maintain established relationships, but also don't be afraid to reach out to organizations that recruit well and have a great campus presence to see how you can work together on an existing event or plan something new to improve visibility.

When planning an event, you'll be most successful if you use available campus resources. Start by having conversations with offices and departments that know about the interests and needs of students. Consider co-hosting an event with a campus office to reach the most students and build positive PR for your Chapter.

Planting Seeds

1. Have all Members wear letters and other Phi Sigma Pi swag at campus events
2. Include information about how to join as part of the event or on a flyer that attendees can take with them
3. Collect attendee contact information to use for "thank yous," as well as invites to future events and Recruitment.

Resources are available to help aid your Chapter in incorporating Recruitment in all you do to engage the campus community, increase Chapter visibility and ensure Recruitment success.

Review Recruitment 365 resource linked in the Additional Resources section.



What's Due When Administratively

The following academic year form submissions can be found in the [Chapter Admin Portal](#) (CAP) unless otherwise noted. In your role you will work with the Chapter Secretary and Treasurer to ensure that the online forms are timely submitted.

Semester Schools

Fall Semester

Oct. 1:

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

Dec. 1:

- Change [Initiate to Member](#)
- Submit Induction Dues and Fees for new Members
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)

Spring Semester

March 16:

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

May 1:

- Change [Initiate to Member](#)
- Submit Induction Dues and Fees for new Members
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)

Quarter Schools

Fall Quarter

[CAP = Chapter Admin Portal](#)

Dec. 1:

- Change [Initiate to Member](#)
- Submit Induction Dues and Fees for new Members
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)

Winter Quarter

March 1:

- Change [Initiate to Member](#)

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

- Submit Induction Dues and Fees for new Members
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)

Spring Quarter

April 30:

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

June 1:

- Change [Initiate to Member](#)
- Submit Induction Dues and Fees for new Members
- [Recruitment/Initiation Planning Form, upload Recruitment and Initiation Calendar](#) and [upload Initiation Handbook and Manual](#)

STEP BY STEP GUIDE TO RECRUITMENT AND INITIATION

Planning for Invitational Meetings

As Recruitment Advisor, it is essential that you plan out every aspect of the recruitment process. The future of your Chapter relies on new, interested members to join Phi Sigma Pi. The responsibility of the Recruitment Advisor and the committee is to provide an opportunity for the Potential New Members and the Chapter to exemplify what each can contribute to the other.

It is also important that the Recruitment Advisor works closely with the Initiate Advisor so that accurate information about the Initiation Program is communicated (timeline, dates, etc.) during Invitational Meetings.

Below is a brief list of items that should be considered while planning for recruitment.

Planning Checklist:

Schedule dates and times and reserve locations for the meet nights

- Familiarity- Is the location well-known?
- Accessibility- Is there easy access for people with disabilities? Is it near campus? Is it within walking distance for students without transportation?
- Timing- Would you be competing against Monday Night Football? Is it during a busy campus-wide activity? (e.g. homecoming) Is it during other organization meeting nights?

**Free marketing materials!



- Atmosphere**- Is the room a comfortable setting? Ensure that the room is the appropriate size to accommodate the anticipated crowd.

Advertise

- Work with Public Relations Committee
- Hang a banner on campus
- Hang up flyers on campus in visible areas
- Use free recruitment materials from National Office via the Resource Center
- Set up info tables at the Student Union
- Set up a table at the University student bazaar/student involvement fairs
- Have everyone wear letters
- Submit information to your school calendars/newsletters
- Use social media posts
- Place flyers in school mailboxes
- Advertise on digital screens and computer screensavers on campus
- Pass out candy, positive affirmations, etc. and include your Recruitment dates

Calculate

how many Members are needed to maintain a stable Chapter

- Look at how many Members are graduating
- Usually about 10% of Initiates are don't completed the program between Pinning and Induction
- ~5-10% of Members go inactive each term (studying abroad, student teaching, etc.)
- See Consistency is Critical section below

Decide

what visual aids will be utilized for Invitational Meetings

- Have the Historian show a video of Chapter information, events and accomplishments.
- Use the Invitational Meeting PowerPoint presentation from the National Office, that you update with your Chapter's information
- Set up tables to display the *Purple & Gold*, *The Scholar's Province*, pictures, folders, graduation stoles/cords, pens, pencils, shingles, Leadership in Action information and other Chapter memorabilia.
- Assign and practice speaking roles for the Invitational Meetings
- Review with the Chapter "Do's" (below)
- Consider refreshments

- Reserve needed AV, tables and chairs for the Invitational Meeting

With each passing term, new ideas will be implemented. Make sure that these ideas are written down in a journal for your successors to use.

When to Hold Invitational Meetings

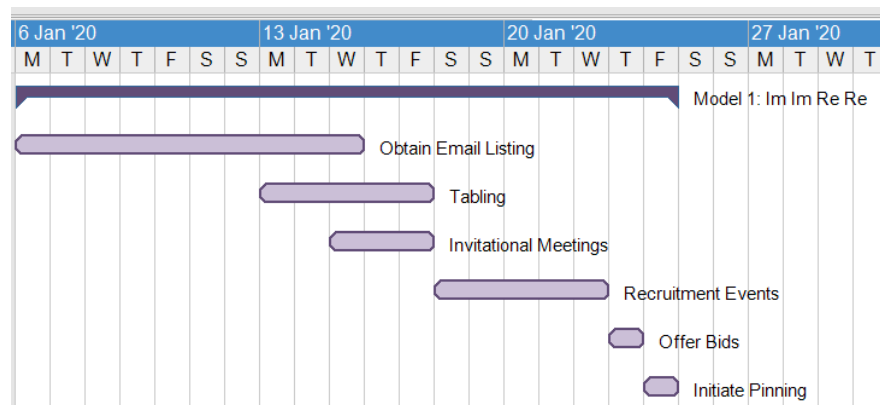
Hundreds of other campus organizations are competing for your Potential New Members. They want their time, energy, enthusiasm, ideas and commitment, too. Sports teams, recreational clubs, societies, musical organizations, other fraternities/sororities and student government are just some of the types of organizations actively seeking people who are also eligible to join Phi Sigma Pi. It is impossible for these people to join every organization that wants them; they must make a choice.

Phi Sigma Pi can help these people make up their minds by simple adaptation. Adapt your recruitment program to keep the momentum going. In other words, if you have a large number of interested people and plan to have recruiting events after the informational meeting, do not stretch these recruiting events out over a long period of time. That critical error can cost you new members.

Sample schedules

1. Holding Invitational Meetings then Recruitment Events

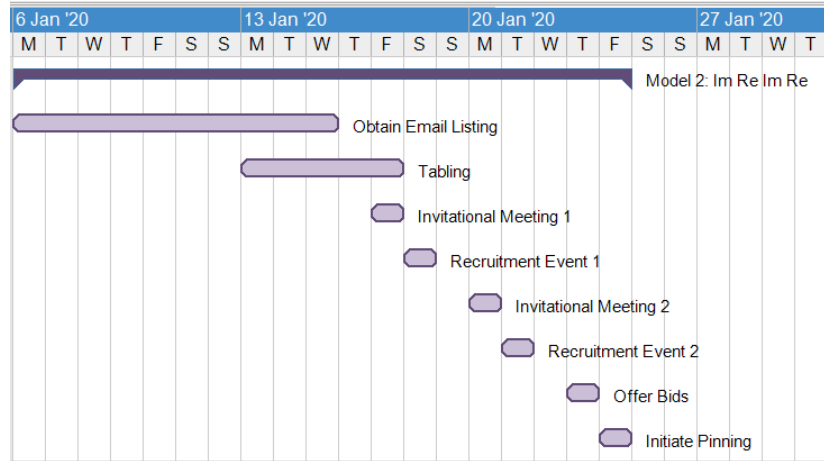
Running Invitational Meetings a few days before Recruitment Events spreads events across multiple days, improving the odds of matching many PNMs' availability. Additionally, you can develop an expected attendance at your Recruitment Events based on attendance to your Invitational Meetings.



2. Alternating Invitational Meetings and Recruitment Events

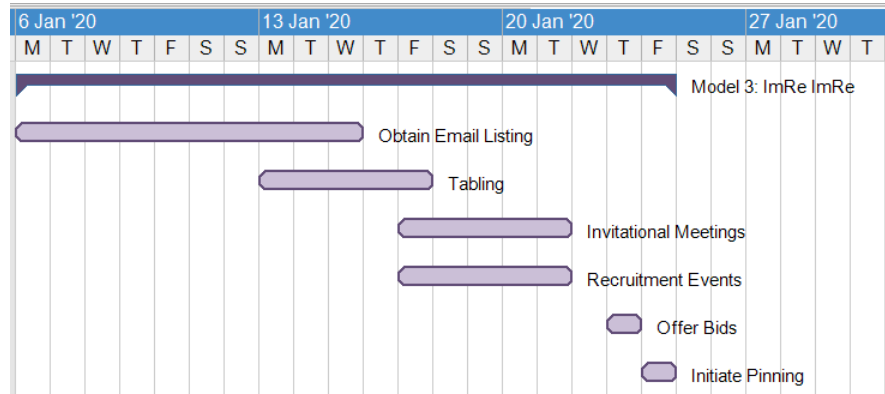
***Choose the schedule that works best for your Chapter and campus*

Some PNMs may be deterred from entering recruitment if they cannot attend the Invitational Meetings at the start of the week. Alternating Invitational Meetings and recruitment events to early and late can alleviate this problem and encourage more PNMs to join.



3. Holding Invitational Meetings and Recruitment Events Simultaneously

Operating Invitational Meetings at the same time as Recruitment Events shows what Phi Sigma Pi is immediately. This can also help to shorten the recruitment period to comfortably within one week.



For good planning, tell the Potential New Members at the Invitational Meeting when, where and what all your Recruitment Events will be. This allows PNMs fit the events into their schedules, and you will have more successful events. Spacing events a few days apart also allows time for the success of your early recruiting events to buzz around campus and generate more interest for future recruiting events. Keep in mind that until you pin the Initiate, you have a very high risk of losing that person.

The Ideal Number to Ensure Chapter Stability

Chapter Size: Number of Members

Ideal Chapter size is a number which varies from campus to campus, program to program. As a general rule, Chapters with 50 to 90 members tend to be the most visible, productive and dynamic Chapters. However, all Chapters can make three assumptions that will be consistent regardless of which campus they are on:

1. The Initiation Program must develop dedicated, knowledgeable, trustworthy, caring and quality Members.
2. Large numbers of quality Members are always better than fewer quality Members since they provide long-term stability.
3. It is the Chapter's responsibility to recruit quality Members, not hope to get them.

The recruitment goal should be re-evaluated periodically to allow for changing situations. Chapters hovering around 20 active Members are very susceptible to graduation effects, apathy and lack of people-power due to burnout. Consistency in the number of new people admitted into the Chapter each term is also critical to the success of the Chapter. Contact the National Office for help in coming up with your Recruitment goal.

Chapter Size: Consistency is Critical

Chapter A

Total # of actives at year-start	45
# of Initiates starting program	+ 33
Initiate attrition (<i># that leave the program</i>)	- <u>3</u> (<i>10% of Initiates who join program</i>)
Total # of actives after inductions	75
Inactive members	- 7 (<i>Typically 5-10% of total</i>)
Transferring/co-oping members	- <u>3</u> (<i>Typically less than 5%/year</i>)
Actual # of active members	65
Members graduating both fall & spring	- <u>15</u> (<i>25% if all 4 classes equally represented</i>)
Total # of actives at year-end	50



***Samples of 3 Chapters and their Chapter size calculations. See Page 29 for blank template*

Chapter B

Total # of actives at year-start	50
# of Initiates starting program	+ 28
Initiate attrition (<i># that leave the program</i>)	<u>- 3</u> (<i>10% of Initiates who join program</i>)
Total # of actives after inductions	75
Inactive members	- 7 (<i>Typically 5-10% of total</i>)
Transferring/co-oping members	<u>- 2</u> (<i>Typically less than 5%/year</i>)
Actual # of active members	66
Members graduating both fall & spring	<u>- 18</u> (<i>25% if all 4 classes equally represented</i>)
Total # of actives at year-end	48

Chapter C

Total # of actives at year-start	48
# of Initiates starting program	+ 31
Initiate attrition (<i># that leave the program</i>)	<u>- 3</u> (<i>10% of Initiates who join program</i>)
Total # of actives after inductions	76
Inactive members	- 6 (<i>Typically 5-10% of total</i>)
Transferring/co-oping members	<u>- 4</u> (<i>Typically less than 5%/year</i>)
Actual # of active members	66
Members graduating both fall & spring	<u>- 13</u> (<i>25% if all 4 classes equally represented</i>)
Total # of actives at year-end	45

Chapter Size: Blank Template

Total # of actives at year-start	_____
# of Initiates starting program	+ _____
Initiate attrition (<i># that leave the program</i>)	- _____ (<i>10% of Initiates who join program</i>)
Total # of actives after inductions	_____
Inactive members	- _____ (<i>Typically 5-10% of total</i>)
Transferring/co-oping members	- _____ (<i>Typically less than 5%/year</i>)
Actual # of active members	_____
Members graduating both fall & spring	- _____ (<i>25% if all 4 classes equally represented</i>)
Total # of actives at year-end	_____

Consistency allows the Chapter to plan and predict budgets better, offers stability, allows for better planning of future projects since you know how much people power you will have, and eliminates the pains of having to deal with excessively large or extremely small Initiate classes. If you compare the total number of active Members at year-start with the total number at year-end for each of the three years for Chapter A, it is easy to see that Chapter A is consistent. Note how many variables really determine the true Chapter size at any given point throughout an academic year (number of actives, number of graduating, etc.).

All this planning and projecting is terrific, but the bottom line is that all these grand predictions are useless unless the Chapter can generate interest throughout the campus. Having spent time reviewing how important Chapter consistency and survival are, creating a good plan coupled with advertising will allow these goals to be achieved.

Recruitment Themes

To add a little pizzazz to the Invitational Meeting you may want to have a theme. Here are a few suggestions:

1. **Campus Ropes Course** - With small groups, this is perfect for a summer recruiting event on campus.
2. **Pizza parties** - Order pizza from a local restaurant. (See if they'll sponsor it for you.)
3. **Open house** - Meet in a room on campus and be prepared for conversation.
4. **Signature night** - Instruct everyone to bring a plain T-shirt. Chapter supplies the permanent magic markers, liquid embroidery pens, or fabric paints and everyone signs/decorates their shirts throughout the evening. Keep it tasteful!
5. **Progressive dinner** - Each course of the meal is at a different location. Plan appetizers, soup & salad, main course, dessert, etc. You then go to different places for each one!
6. **Brunches** - For a change of pace, have a late morning recruitment on the weekend. It's a great way to start the day. Serve fruit juice, sweet rolls, eggs and ham and coffee.
7. **Picnics** - If it isn't picnic season, try having an out-of-season picnic inside, with tablecloths on the floor, potato salad, chicken legs, pretzels, etc., but skip the ants!
8. **Tie dye night** - Have the Chapter supply the dyes and each person bring T-shirts, pillow cases, sheets, etc.
9. **Chapter Night** - Show the Potential New Member a part of your heritage and pride. In each room (or section of the room) set up tables of Chapter memorabilia, pictures, scrapbooks, trophies, awards, etc. Have a theme in each room (sports, scholarship, etc.). Invite Alumni to participate. All Collegiate and Alumni Members should wear letters!
10. **Cookout/BBQ** - Organize your basic backyard variety. Play games such as croquet and cornhole, etc. Then fire up the grill and serve some Phi Sigma Pi burgers and hot dogs.
11. **Food festival** - Each room serves a different ethnic food: Enchiladas, Greek salad and baklava, spaghetti and Italian cookies, egg rolls and pan noodles, etc.
12. **Ice Cream Social** - Get some big buckets of ice cream, sprinkles, and syrup and have a good time.
13. **Game Night** - Split up into different teams (Potential New Members and Members on same teams) and play light-hearted breaker games.

14. **Service Project** – Work on a service project such as making cards for kids in hospitals or picking up trash in a park. Afterwards have a BBQ or get some ice cream. This incorporates the ideals of the organization into your recruitment activities! Such a great way to introduce what we do as a Membership.

Chapter Swag for Invitational Nights

Visual aids provide a tangible presence to Phi Sigma Pi, though they should not be the only source to communicate what Phi Sigma Pi is about. The aids can be used to exemplify what has been accomplished both on and off campus. It provides an inside glimpse of Phi Sigma Pi.

- Composite
- Organization songs
- Chapter Charter
- Awards/trophies
- Calendar of upcoming Initiation events
- National publications
- Scholastic banners/standings
- Scrapbook, pictures, collage wall
- List of member leadership positions/accomplishments
- Anything special or unique to your Chapter (newsletters, logos, etc.)
- Chapter Alumni directory (gives bigger perspective - national scope, people from hometown)
- Phi Sigma Pi Map- use a white twin size sheet, outline the United States and put stars on the areas where Chapters have been founded. Great conversation piece!



*** Listing of all
Chapters and
locations
[http://phisigmapi.org/find
aChapter](http://phisigmapi.org/find_aChapter)*

***During Invitational Meetings have PNMs fill out this form. It provides you with their contact info & gives them something to do while they wait for the meeting to begin. Can be hard copy or a digital form they can complete on their phones/laptops.*



Potential Member Information Sheet

Name:

Campus address:

Phone:

Home address:

City:

State:

Zip:

Phone:

High School:

Activities:

College Class:

Major:

GPA:

College Activities:

Other eligible friends in school:

How did you hear about Phi Sigma Pi?

Comments:

Please let us know what recruitment events you will not be able to make and why?

Chapter Member Review

As Recruitment Advisor, it is your responsibility to prepare the Chapter Members on how they should present themselves during an Invitational Meeting. You may want to make copies of the lists for the Members to review.

1. Be neat and well-groomed.
2. Treat all Potential New Members equally.
3. Make sure you introduce Potential New Members to each other.
4. Be a good listener and ask open-ended questions. Talk 30%, Listen 70%.
5. Ask productive local Alumni to attend recruiting functions and provide what their role will be.
6. Point out the accomplishments of Members whenever possible.
7. Be enthusiastic at all times. Your enthusiasm will be contagious.
8. Speak truthfully and be as candid as possible in all conversations.
9. Always use a positive approach and next action item. Say, "I look forward to seeing you tomorrow for our event," instead of "Maybe I will see you."
10. Have Members and Potential New Members wear name tags. (Use purple ones for Members and gold ones for Potential New Members to distinguish between each other.)
11. Each Chapter Member should be responsible for enrolling one Initiate.
12. Use a firm handshake and concentrate on the Potential New Member's needs. Look them straight in the eye and say their name a few times in the first five minutes. (This reinforces it in your memory.)
13. Introduce Potential New Members to any Members with similar interests, hometowns, activities or hobbies.
14. Treat all Potential New Members as new-found friends. Recruiting is simply a process of making new friends.
15. Recognize Potential New Members on campus by their first name. Treat them as you would expect to be treated.
16. Create a relaxed atmosphere where the Potential New Member will feel like one of the group. Be polite without overdoing the "guest" routine.
17. Try one-on-one recruiting where you invite the Potential New Member to go somewhere with you. They may be intimidated by large group gatherings and be in need of a more low-keyed recruiting approach.
18. Remember that hard work pays off. If your Chapter can work together like a team, your recruitment will be a success!

Recruiting "Do's":

1. Do listen to the prospective and talk about what interests the Potential New Member.
2. Let Potential New Members know where Phi Sigma Pi excels in Greek Life. How we are 1/3 honor society, 1/3 service organization, and 1/3 social organization.
3. Ensure Potential New Members always have someone with them. There is nothing more uncomfortable than being alone among strangers. If you must leave a PNM, introduce the prospective to another Member first.
4. Be yourself and act naturally.
5. Be upfront with the Potential New Members about Phi Sigma Pi. Share the Initiation calendar/time commitment upfront during Invitational Meetings and tell them the financial commitment. Share personal stories about managing time.
6. Speak to the accomplishments and attributions of Chapter Members. Remember the phrase: *If you do not have anything good to say, don't say anything at all.*
7. Spread out and speak with Potential New Members. Do not congregate with other Members in groups. You will have plenty of time to talk with each other later, and you do not want the PNM to feel that no one is interested in them.
8. Maintain your enthusiasm at all costs. Show excitement throughout the whole event. If you feel your conversation is dragging, introduce the Potential New Member to some other Members.
9. Dress and carry yourself appropriately for the occasion and see that all other Members do the same.
10. Stress the areas where your Chapter is particularly strong and discuss plans for reinforcement and improvement and how they may be able to contribute to the areas that need improvement.
11. Create Recruitment events where Members and Potential new Members will need to talk to one another.

Recruitment Conversation Topics

- Family
- Current events
- Books or music
- Future ambitions
- Hobbies and sports
- Chapter service projects
- College intramural sports
- Summer vacations and trips

- Plays, musicals and movies
- National organization and [Alumni Chapters](#)
- National Convention
- Chapter group activities (the fun of doing things together)
- Hometowns (briefly expand on the "where is it?" response)
- Residence life (if you are unable to speak positively, avoid the topic)
- Chapter social activities (recreational events, formals, road trips, etc.)
- Chapter finances (Potential New Members should always be informed of the financial obligations before they become Initiates)
- Campus activities and events (homecoming, student government, organizations and honoraries)
- Chapter progress (Initiation Program, activities with other Chapters, scholarship, etc.)
- Offices and Officers in the Chapter (the opportunities and responsibilities of leadership)


The Potential New Member Mentality

The ten most frequently asked questions by Potential New Members:

1. How will this organization benefit me?
2. What are the expectations of being an Initiate?
3. What is the recruitment process all about?
4. Does it cost a lot to belong to this organization?
5. Can I have friends who are not in the organization?
6. How involved or active must I be?
7. How much time is involved?
8. Will this organization hurt my grades by demanding too much of me?
9. Will organization membership mean anything after I get out of college?
10. What if I am already a member of a social organization. Can I still join Phi Sigma Pi?

The most common objections to entering the Initiation Program:

1. I would like to think it over.
2. I would like to talk to my parents.
3. I cannot afford to join an organization.
4. The organization requires too much time.
5. My parents think it is a foolish expense.
6. I do not think that I would be any credit to the organization.

 **If you receive interest from a Graduate student on your campus.

7. My friend cannot join an organization, so I have decided not to join.
8. I promised my parents that I would not join an organization in my first year of college.
9. My friend and I both promised that we would join the same organization or none at all.

The actual concerns an individual has when making the choice:

- Scholarship
- Chapter activities
- Security - "Can I fit in?"
- Reputation of the Chapter
- The people and Membership of the Chapter

Each Member must be able to respond to these concerns and scenarios in order to have a successful recruitment.

Common Objections to Joining an Organization

Remember: It is important to keep the Potential New Member talking so that you know what their objections are, if any, so that you can address these concerns and address them specifically. There is no objection that can't be met and turned into a "mind changer" aid for the recruiter.

How to Overcome Most Objections

Listen carefully to the objection. A willingness to listen compliments the Potential New Member and also tells more about what the Potential New Member is thinking. By listening carefully, one of the following things will usually occur:

1. The Potential New Members may talk themselves out of the objection.
2. The real objection will surface.
3. An insight into the best way to handle the objection will be obtained.

Attempt to understand and empathize with the potential member;

1. "I hear what you are saying..."
2. "I had a similar concern before I decided to join."
3. "I know a Member who had a similar concern before they joined. Let me introduce you to them so you can talk about it."

Convert the objection into a question that can be answered. Keep the Potential New Member objection as if they are raising a question rather than posing an objection.

Answer the question. In this regard, there is no substitute for preparation. The answers must be known and presented effectively. It is encouraging to remember that while there are few objections, there is an endless variety of answers. Above all, be honest!

Sample Objections and Accompanying Responses

Objection: "I don't think I can afford the organization," or "an organization has nothing to offer for the money you pay."

Response: "I realize your concern for the cost. I had a similar concern myself, at first. But if I can show you that the benefits of the costs, payment plan options, and scholarship offerings, are you interested in joining?"

This objection is easy to respond to because the organization is a cooperative. You can prove that it is less expensive to be in an organization than it is to be independent simply by listing all the things that you get for your money and asking the Potential New Member if these things could be purchased for the same money as an independent.

Objection: "I am afraid the organization will hurt my grades."

Response: "I can understand. I had a similar concern when I joined my freshman year. However, if I can show you how we will help you to improve your grades by joining, will you join?"

This objection gives you the opportunity to explain the general statistics and your local scholarship program. Explain that in Phi Sigma Pi the first priority is academics and the second is to the organization. Show the Potential New Member exactly how much time it takes and that being a Member does not take away from study time. Also remember to point out that Phi Sigma Pi is comprised of Members of many different majors and Members who are available to help tutor other Members.

Objection: "My parents do not want me to join an organization."

Response: "That is easy to understand. At first, my parents felt the same way, but if your parents agree, then you would join, right?"

Many parents have no idea what the organization is, and for this reason they may object. You must talk to the parents and make them aware of all the benefits of joining the organization - scholarship, friendship, leadership, etc. A personal visit is best, but in many cases a phone call will do the job. Often the best time to call is right then while talking with the Potential New Member. Another



***How to respond to PNM concerns*

alternative is to send informational materials (brochure) home with the PNM so it can be shared with parents.

Objective: "I am interested in leadership, and your Chapter isn't one of the big popular Chapters on campus."

Response: "One of the ideals that Phi Sigma Pi promotes is leadership. As a Member, you will have several opportunities to develop your leadership skills."

If you are a small Chapter it is easy to show that if there is interest in being a leader, there will be more opportunities and a greater chance to be an officer in this Chapter than in a big Chapter. Also, you may explain the Chapter's goals and its growth potential. Include the Potential New Member as a leader in these Chapter plans to show how they can really benefit.

Objection: "Joining an organization is a big decision."

Response: "Although it is a big decision, by joining you will benefit from many opportunities you may not have had otherwise." At this point, you can give examples of the benefits of membership (friendship, honor for academic excellence, Leadership in Action, etc).

Objection: "My friend is going to join another organization, and we want to be in the same one."

Response: "One of my best friends is a member of a different organization, so I know how you feel. However, if I can show you the advantages of joining different fraternities, will you join?"

It is quite understandable that close friends want to "stick together," but by joining different fraternities, each will have an opportunity to make new acquaintances and friends." Stress that the Members have many good friends outside of Phi Sigma Pi, but should be open to joining the organization that best represents your mission.

Additionally, students are able to join Phi Sigma Pi (a Member of the Professional Fraternity Association) as well as social organizations and other Professional Fraternity Association member organizations.

Objection: "I feel I may become separated from campus life," or "It's too restrictive on individual freedom."

Response: "Actually, becoming a Member of Phi Sigma Pi will make you a closer part of the university as the Chapter participates in activities with other organizations, etc."

** Professional Fraternity Association
<http://www.professionalfraternity.org/>

Organizations are not for all people and do require a commitment to the group to be successful. However, this need not be a restriction on individual freedom, but rather an opportunity to develop individual potential. An organization is a platform from which members can get involved in as many activities on the campus as they wish. Being in the organization no way separates its Members from the campus or society as a whole, but rather, it opens doors and encourages participation in more activities. Being involved in a campus organization can only make you more visible and involved in campus life.

At your Chapter meeting or recruitment workshop, you can read two (2) objections and ask Chapter Members how they would handle the situation. This is great practice for the upcoming recruitment weeks!

SURGE

SURGE is Phi Sigma Pi's Recruitment program that is designed to support Chapters in increasing the number of Potential New Members that go through their Recruitment process. There are three ways your Chapter can participate in SURGE.

1. Recruitment Materials- Receive posters, handouts, table tents, business cards, water bottle sleeves, social media images and more with your Recruitment dates, locations and times. Leave the work to create all of these advertisements to the National Staff so that your Chapter can focus on the PNMs.
2. Your Phi Sigma Pi Webpage- Every Phi Sigma Pi Chapter has a webpage on phisigmapi.org. This page is all yours for

The Beta Sigma Chapter at Michigan State University
 Founding Date: March 19, 1995
 Chapter President: Dibhi Vinayawan, vinayaw@mso.edu
 New Member Coordinator: Rozzie Bloch, blochroz@mso.edu



The Beta Sigma Chapter of Phi Sigma Pi is recruiting achievers that are passionate about developing as leaders and improving humanity through scholarship, leadership and fellowship. Don't that sound like you? You're invited to meet our Members and learn about the process of joining Phi Sigma Pi at one of our upcoming events!

Invitational Meetings

Monday, Sept. 9 at 7 p.m. in Kofree Hall - S105
 Tuesday, Sept. 10 at 7 p.m. in Kofree Hall - S106
 Wednesday, Sept. 11 at 7 p.m. in Kofree Hall - S106
 Thursday, Sept. 12 at 7 p.m. in Kofree Hall - S105

Recruitment Events

Music - Tuesday, Sept. 17 at 7 p.m. in Kofree Hall - S105
 Mocktails - Thursday, Sept. 19 at 7 p.m. in Kofree Hall - S105

Recruitment. By filling out the SURGE form, you can customize the information on the website, adding pictures and your recruitment dates, locations and times. Also on this webpage is a RSVP form. Advertise this link so PNM, can fill out the form and let you know which events they will be attending. The other perk of having PNMs fill out the RSVP form is that we will collect their name, email address, phone number and graduation year to start a PNM list for years to come if they decide to wait another term. This is a great way to start creating email contact lists for those interested in Phi Sigma Pi.

***Chapter can choose up to 3 ways to participate.*

3. Recruitment Emails- Leave the administrative work to the National Staff. We will send out a customized Recruitment email invitations with your Chapter picture, dates, locations and times to a list of eligible PNMs. This list can come from your school's Registrar's Office, Faculty Advisor or could be a list that you have put together throughout the year (*see Recruitment 365 on page 20*). Sending out Recruitment emails with your Chapters' information in it has been proven to be a Recruitment booster!

ADVERTISING AND PUBLIC RELATIONS

Advertising for Success

To have a successful recruitment, your Chapter must advertise. When attracting new members, it is essential to advertise properly, at the right time and place, to the right target group, and with the proper image. This can make or break the Chapter's future.

***Consider ways to use social media for advertising*

Chapters are often concerned about not being able to attract new members. You need to look at the different methods of advertising to discover what methods work best for your Chapter and your campus. The Chapter must take the lead to ensure its future.

One of the many benefits of belonging to a national organization is the role the National Office can play in assisting the Chapter in recruiting new members and ultimately ensuring the Chapter's survival. The National Headquarters staff is here to help you generate ideas and attract Potential New Members. One example is the recruitment program called SURGE (<https://phisigmapi.org/surge>).

Personal and Impersonal Advertising

There are two forms of advertising; personal and impersonal. Alone, one style of advertising is not effective. If your Chapter advertises well, the results will be phenomenal and the Chapter will have the luxury of being more selective of the members it admits into its Initiation Program. Do not jeopardize the Chapter's well-being by not advertising properly. This ultimately could lead to having a small initiation class, limiting the capability of performing all the future expectations of your Chapter.

Personal Advertising includes:

- Sending eligible Potential New Members an invitational letter or email
- Visiting eligible students in person
- Placing form letters/invitational flyers in all campus mailboxes

Impersonal Advertising includes:

- Posters/Banners
- Newspaper ads
- Sending out a letter on a campus or college listserv
- TV ads and radio spots
- Informational table set up in the student center or at an organizational fair
- Table tents in cafeterias, snack bars or off-campus restaurants (if owner permits)
- Social media promotion
- Business cards
- Water bottle sleeves

Preparing Invitational Letters

Research has shown that mailing/emailing personal invitations to eligible students is the best approach. Invitational letters provide a personal touch that allows prospective members to feel recognized for their accomplishments.

To ensure that all is accomplished effectively follow the outline below:

- ___ Call the Registrar Office or Office of Student Records two days after classes start or work with your Chapter Advisor
- ___ Request local mailing address and/or emails for students who have: (A request may need to be in writing)
 - ___ 3.00 GPA and above
- ___ Type a prospective member letter (or contact the National Headquarters for SURGE)
- ___ Have the Chapter President sign the letter
- ___ Make sure the letter/email includes the date, time and place of the event
- ___ Secure envelopes for the letters/labels/brochures/email design
- ___ Delegate tasks to committee
- ___ If mailing, obtain mailing labels and assemble (letter/brochure/envelope)
- ___ Mail/email letters 10 - 14 days prior to the meeting
- ___ Mail letters First Class or use the campus mail if it is reliable
- ___ Check into bulk mailing but beware of the uncertainty of the delivery date

_____ If emailing, send email invitations 10-14 days in advance.

_____ Send follow up email 7 days in advance

_____ Send reminder email 3 and 1 day(s) in advance

This process usually takes two to three weeks, so allow enough time to receive the addresses and mail or email the letters by the preferred date. If the school is unable to assist you in obtaining mailing/emailing list, the National Headquarters can help you.

Often times Chapters prefer to do a bulk mailing instead of first class due to the cost. Sending mail third class will save on cost. However, this is discouraged because of the uncertainty of the delivery dates. Sending postcards are another, cheap and efficient idea.

Sample email/label request

Mailing Label Request
Zeta Chapter - Phi Sigma Pi

To: James M. McCallister
Office of the Registrar

From: Phi Sigma Pi
Zeta Chapter
State University

Date: February 14, 2021
Re: Mailing label request

The Zeta Chapter of Phi Sigma Pi, requests mailing addresses and/or emails for all undergraduate students at the State University with a minimum cumulative grade point average of 3.00. Specific GPA information is not required.

If 3.00 GPA list cannot be generated, Phi Sigma Pi requests the names and local addresses of all freshman, sophomore and junior students.

The labels will be used for a one-time mailing inviting all interested students to an Invitational Meeting for Phi Sigma Pi, Zeta Chapter.

To ensure that the invitations are received on time, we will need the students' school addresses (including city, state and zip code) rather than permanent home addresses. Additionally, we will need these labels as soon as possible since our Invitational Meetings are scheduled for the first week of April.

Upon completion, the labels should be mailed to:
Sanders P. McComsey
Chapter President
Union Building

Box 214

Any costs incurred with this request should be billed to the address listed above.

Thank you for your kind and prompt attention to this matter.

Sincerely,

Sanders P. McComsey
Chapter President

Joseph Torchia
Chapter Advisor

Sample recruitment letter/email

Phi Sigma Pi
Zeta Chapter of State University

September 6, 2021

Dear Prospective Member of Phi Sigma Pi:

Congratulations! You have the unique opportunity to make history! All students currently enrolled at State University, who possess an overall Grade Point Average of at least 3.00, are being offered membership into Phi Sigma Pi.

All eligible students are cordially invited to a Meet Phi Sigma Pi Night on Sunday, September 18, and Wednesday, September 21, at 7:00 p.m. in the Ballroom of the Student Union. Please feel free to invite any friends who also meet Phi Sigma Pi's requirements.

Founded in 1916, Phi Sigma Pi is an organization open to all students, dedicated to the ideals of scholarship, leadership, and fellowship. The Zeta Chapter at State University was founded in 1940 and has been an active organization on campus and in our community ever since.

Phi Sigma Pi offers you the opportunity to become involved in a dynamic campus organization at State University. Our activities range from community service and educational programs to social and recreational events. We are looking for students who are well-rounded and genuinely interested in keeping this organization a respected campus leader.

Please contact me if you have any questions about Phi Sigma Pi. Looking forward to meeting you so come out and meet Phi Sigma Pi!

Very truly yours,

C.H. McClure
President, Zeta Chapter
(123) 555-1916

The Personal Contact Team

People join people - not organizations. The best contact is a personal one - a real person speaking to another person. The Potential New Member has the opportunity to meet you and form an opinion of your Chapter. But most importantly, they can informally ask questions about Phi Sigma Pi.

Personal contact is accomplished through a two-person contact team visitation. Teams are selected in advance by the Initiation Committee and should be composed of an experienced recruiter and a less experienced one, typically an upperclassman and an underclassman, etc. Everyone is on a team.

The Prospects

At the Chapter meeting, you will put a large sheet of paper on the wall and ask everyone to give names of prospective members. List them with a magic marker. Your school also can generate a list of all students with a 3.00 GPA and greater. Normally you will get at least fifty names through the "brainstorming" technique. Put the names in a Google doc/Drive, with an email address and any other information. Of course, you may already have some names on file, those who dropped out of the recruitment process, etc. Then write their names on index cards.

The Mechanics

Arrange 3x5 cards according to locations and give each team no more than five prospective members. Teams have one whole day to contact their perspectives. The first set of cards is given to each group at the end of the Chapter meeting.

The Visit

The purpose of the visit is to make a friend. Be concise and brief and talk about Phi Sigma Pi. Only five or ten minutes is needed unless they want to talk more.

If they are a good prospect, the PNM will be visited the next night, and the next by two more Chapter Members until the PNM feels comfortable and knows a number of Members. At that point the PNM should be invited to an informal activity of the organization to meet more Members and others interested in Phi Sigma Pi.

Feedback Sessions

Every evening, or any other regularly designated time, everyone should meet to turn in cards and discuss their visits. Some cards will be eliminated but you will also be adding new ones of roommates and friends. Comments on prospects should be written on the cards, such as "extremely interested" or "considering but need additional information."

Each team is then given a new set of cards (some new cards, some repeats) to make contact before the next meeting. These are great spirit builders, too.

When inviting a Potential New Member always:

1. Give a choice of two informal events; it is difficult to say no twice.
2. Ask the PNM to bring a friend; the PNM will be more comfortable and it will increase your prospects.

Impersonal Advertising


In addition to the personal invitational letters, it's a great idea to provide more awareness of the future recruitment nights. This can be accomplished by using posters, newspaper ads, electronic billboard messages, social media and hanging banners on campus. These methods should be used to reinforce the personal letter, email or visit.

If your Chapter advertises well, in conjunction with a strong recruitment plan, there can be a positive impact on the results and the Chapter will have the luxury of being more selective of the Members it admits into its Initiation Program. Do not jeopardize the well-being of the Chapter by not advertising properly. This could lead to having small initiation classes incapable of performing all the future Chapter expectations.

Good Public Relations

Good public relations does not mean simply inviting people to your Invitational Meeting and recruiting events, being friendly, and helping them decide to enter the Initiation Program. It also means follow-up! Follow-up is key to an exceptional campus image. Follow-up makes more people give you a second look. The news of Phi Sigma Pi spreads across campus to interest people who may not have considered joining otherwise. Follow-up includes:

1. Posting on Social Media about the Initiates in the Chapter Initiation Program. Show the campus the quality people who associate with Phi Sigma Pi. This also makes the Initiates feel good.
2. Publicly thanking all exceptional Members who directly contributed to generating interest and bringing an individual into the Initiation Program. This encourages other Members to bring Potential New Members to future events, which ultimately benefits the entire Chapter.
3. Sending a letter to all people who were at either your Invitational Meeting or any recruiting events, but decided not to join. Thank them for their interest and encourage them to come out again next term or to contact you if they have any questions.

 ***Good PR = follow-up!*

4. Sending a letter/email to all people who were not accepted into the Initiation Program by the Chapter. This helps to limit bad feelings which can lead to rumors and poor campus image. Thank them for their interest, and explain that the Chapter was unable to accommodate them that term.

Sample Regret Letter

***How to send notice of not receiving a bid*

<p>Zeta Chapter of State University Phi Sigma Pi</p> <p>September 27, 2021</p> <p>Dear Prospective Member of Phi Sigma Pi:</p> <p>Thank you for your interest in the Zeta Chapter of Phi Sigma Pi. It is encouraging when students of State University express interest in our ever-growing organization.</p> <p>Although we are most impressed with your scholastic and extracurricular achievements at the State University, the Zeta Chapter regrettably is unable to extend an invitation to you at this time.</p> <p>Because there were so many qualified prospective members, this was a very difficult decision for us to make. We only wish that we were able to accommodate everyone. We strongly encourage you to take part in our spring recruitment!</p> <p>We wish you much success in all your future endeavors. Sincerely,</p> <p>Sanders P. McComsey Chapter President Phi Sigma Pi</p>


Invitational Meeting

The purpose of this meeting is to spark an interest in Phi Sigma Pi, answer questions, outline the goals of the organization, meet people, and prove that the organization is for them. Most Chapters have two Invitational Meetings per term (always plan a snow/inclement weather date when the season dictates). Sunday, Monday, Tuesday, and Wednesday nights, between 6 - 9 p.m., seem to be the most popular with the least amount of conflict between classes, jobs, etc. A typical Invitational Meetings has the following characteristics:

_____ All active Members are present. (Mandatory Event)

_____ All active Members wear letters/colors.

- ___ Scrapbooks/awards/banners are displayed.
- ___ Refreshments are provided. (chips, pretzels, soda, etc.)
 - * Members should not consume the refreshments during the Invitational Meeting.
- ___ All active Members and Potential New Members introduce themselves - name, major and why they joined or are interested in joining Phi Sigma Pi.
- ___ Presentation of national Invitational Meeting powerpoint or Chapter recruitment video by the President, Recruitment Advisor and Initiate Advisor.
- ___ Question and answer period.
- ___ Interested students sign-up and are informed about the next meeting.
- ___ Allow time for post-meeting socialization.
- ___ Shake hands with Potential New Members as they leave.

 ***Be prepared with icebreakers*

Preparation for the Informational Night:

- ___ Recruitment committee - one hour before meeting begins set-up.
- ___ Membership - half hour before meeting begins.
- ___ ENERGIZE time (do Chapter chants, songs, etc.)
- ___ Review information and provide additional updates.
- ___ Ask for greeters (to welcome prospective members at the door).
- ___ Members should be standing ready to converse with incoming Potential New Members.

Start on time! This shows that you value the prospective members' time.

Keep in mind that you might be very surprised by the turn-out, especially when the invitational letters were used as a means of advertising.

Invitational Meeting Schedule

- 1 **Check-In**
(5 Minutes)
- 2 **Ice Breaker**
(10 Minutes)
- 3 **Presentation**
(15 Minutes)
- 4 **Scholarship/
Leadership Activity**
(15 Minutes)
- 5 **Closing**
(15 Minutes)

If your Chapter chooses to host stand alone Invitational Meetings, you will want to make the most of your time with Potential New Members. As a student, you know that your time is valuable. Most Recruitment Schedules have an hour carved out for an Invitational Meeting, but the presentation itself usually lasts only 15 to 20 minutes. You want to offer PNMs more than just a presentation and a “please find us if you have questions,” especially when you’re not holding a Recruitment Event immediately following. Include activities that will be engaging for Potential New Members and give them an opportunity to interact with Members and other PNMs. You should also remember to thank them for attending, invite them to upcoming events and allow time to exchange contact information. Watch this [video for an example Invitational Meeting](#).

***Watch video
example of
Invitational
Meeting*

Check-in (5 min)

It’s likely that your Chapter Members are required to sign in at Recruitment Events in order to get attendance credit. So why wouldn’t you do the same for PNMs? It’s important to always keep attendance at your Invitational Meetings and Recruitment Events, so you can follow up personally. Taking attendance can be as simple as writing general information like name, major, and graduation year on a list, but a best practice is to get as much information as possible about the PNM. Consider using a half sheet asking for preferred methods of contact and why they are interested in joining Phi Sigma Pi. This information will help when following up, and can also be used during Bid Voting. A sample is provided on page 32.

Ice Breaker (10 min)

Ice breakers are a relatively quick, fun and engaging way to start conversations between Members and Potential New Members. Ice breakers usually take anywhere from 5 to 10 minutes, so you should be sure to plan accordingly. While there are some ice breakers that work better in small groups, and ones that are better for large groups, the National Office suggests using those that can be used with groups of any size since Recruitment attendance can sometimes be unpredictable.

See the Ice Breaker Activities linked in the Additional Resources section in the back of this manual.

**Presentation (15 min)**

Most Chapters use a PowerPoint presentation to share information with Potential New Members at Invitational Meetings. The presentation should include information about Phi Sigma Pi's ideals, benefits of Membership, Initiation Program requirements and upcoming Recruitment Events. You also can include Chapter photos to make it more personal.

Scholarship/Leadership Activity (15 min)

During Invitational Meeting/Recruitment Events is a great way to showcase what Phi Sigma Pi is all about: scholarship, leadership and fellowship to improve humanity with honor. We have created three ways to add these components into your event:

- [Create HOBY Hugs](#)- This is a way to showcase the National Philanthropy HOBY.
- Create a service project that gives back to your Local Philanthropy.
- Complete a Leadership in Action Module activity based on Personal Communication Styles.

Closing (15 min)

When the presentation is over, you don't want to just send PNMs on their way. Make sure to thank them for attending and provide an opportunity for them to ask questions. This could also be a time for Potential New Members to have meaningful conversations with Members and other PNMs. The closing is just as important as the other parts of an Invitational Meeting.



***Check out the sample Communications Style LiA for PNMs in the Invitational Meeting presentation*

Recruitment Event Schedule

- 1** Check-In
(5 Minutes)
- 2** Activity
(45 Minutes)
- 3** Closing
(5 Minutes)

Much like with Invitational Meetings, you should prepare a schedule for your Recruitment Events. We often see Recruitment Events that are scheduled for an hour, and you want to be respectful of everyone's time. Recruitment Events rarely include presentations like at an Invitational Meeting, but you should still take attendance and welcome PNMs with a short introduction to the planned activity. You also will want to include a closing for the event, to thank everyone for attending and offer information on next steps.

Check-in (5 min)

If PNMs have attended an Invitational Meeting already, you won't need to collect information beyond their name when they attend a Recruitment Event. It may be good, however, to have half sheets available for any Potential New Members who did not attend an Invitational Meeting. Make sure you have a plan for getting them the information that they missed, like the Initiation Program requirements and upcoming events.

Activity (45 min)

Recruitment Events are the perfect time to communicate the organization's mission and values to Potential New Members. Whether you've planned a service project or an activity that conveys the importance of lifelong learning, PNMs should learn a lot about your Chapter and its Members at the Recruitment Event. Creating events that are both active and engaging will help you to leave the lecturing in the classroom and get everyone involved. This is where your Chapter's commitment to Scholarship and Leadership can really shine!

See the Mission-Aligned Events linked in the Additional Resources section in the back of this manual.



Closing (5 min)

No matter the event, whether indoors or out, it is important to have a definitive closing, a time for you to thank PNMs for attending. Let them know that you enjoyed getting to know them and that you are looking forward to them returning for more events. This would be the time to tell them about next steps, like if they need to complete an application or when bids will be offered.

Get the Chapter Involved

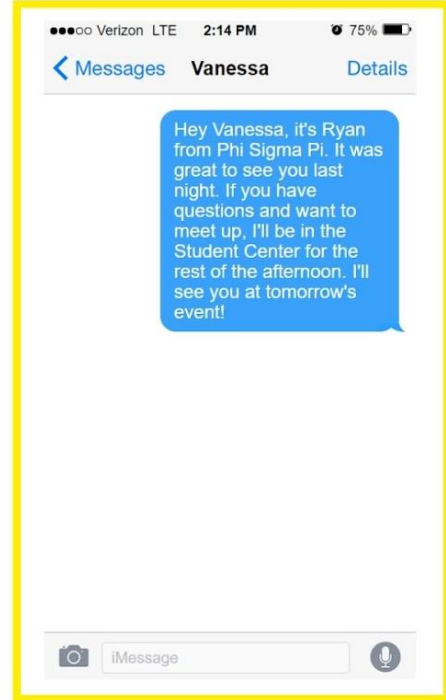
Here are some of the programming-related tasks that will need to be done:

- If you have Members who are introverted, consider asking them to set up or tear down the space or take attendance.
- If you have Members that are excellent speaking in front of a group, they may be able to lead ice breakers, add something during the presentation or introduce an activity.
- Members who have been identified as potential Bigs could be tasked with initiating conversations with individuals and small groups, since it will be most important for them to get to know the PNMs.
- For Members attending class during event times, consider asking them to pick-up snacks and drinks or have them share and invite people on social media. This could help Members meet any Recruitment attendance or points requirements for your Chapter.
- The important thing to remember is that everyone has talents that can be utilized during Recruitment, which can make the Recruitment Advisor's job easier and enjoyable.

Follow Up

One really important thing to remember--and a way to get Members involved--is follow up. It's important to follow through on your hard work by following up promptly with PNMs after each event.

Follow ups are most meaningful when they are personal, so get Members involved with sending a quick message via email, text, or dm. Try something like "It was great to see you last night. If you have questions and want to meet up, I'll be in the student center for the rest of the afternoon. I'll see you at tomorrow's event!" The personal touch goes a long way to showing PNMs what Fellowship looks like in your Chapter.



***Follow up with PNMs wishing them luck on mid-terms or finals*

Remember that follow ups should be timely. You want to reach out while Phi Sigma Pi and the event they attended are fresh in their mind. Don't wait too long, or PNMs may lose interest.

Promoting Phi Sigma Pi

The Presentation

As Recruitment Advisor, you must understand what motivates people to devote time and energy into joining an organization. It is important to find out what their needs, wants, fears and ambitions are (Review Chapter Member Review). Present Phi Sigma Pi as a means for the Potential New Members to achieve their goals. It is important to remember to keep a positive attitude and show the interested students the strong points of the Chapter and how membership could benefit them.

The following are suggestions on how to address specific topics. Take the time to learn this information and discuss in your own words.

What is Phi Sigma Pi?

Phi Sigma Pi is an honor organization that recognizes outstanding scholarship and leadership and promotes fellowship among its

Members. It is an organization that is comprised of Members with different backgrounds and majors who are brought together by similar goals and working toward a common good.

History

Phi Sigma Pi was founded at Central Missouri State University in 1916 by a small group of men. The organization became national in 1921 and has since evolved from an honorary professional organization into a professional education organization and then, in 1966, to an honor organization for all disciplines. The organization became coeducational in 1977 and gender inclusive in 2014. Since its founding, Phi Sigma Pi has Chartered Chapters from Maine to California and continues to build and expand. So far, more than 50,000 students, alumni, and faculty in more than 130 colleges and universities nationwide have met the high standards for membership in Phi Sigma Pi.

Purpose

As an honor organization founded upon superior scholarship, Phi Sigma Pi strives to advance academic ideals. Phi Sigma Pi also serves as a common social ground that encourages close friendships among its Members. In carrying out the purpose of the organization, Phi Sigma Pi inspires its Members to acquire and disseminate knowledge, apply professional skills through leadership, and foster fraternal fellowship.

Benefits

As a Member of Phi Sigma Pi, you will make lifelong friendships. You will develop leadership skills and the ability to work productively with others towards common goals. Serving the community through Phi Sigma Pi will give you the personal satisfaction of helping others. As a Member of a national honor organization that promotes scholarship, community service and the application of professional skills, you will enhance your career opportunities. And this is just the beginning...

Activities

Phi Sigma Pi is very involved. The organization hosts or attends educational programs such as forums, lectures and workshops on a wide range of challenging and interesting topics. For service projects with local philanthropies, the organization plans blood drives, supports HOBY and provides a community outreach program for underprivileged children and senior citizens.

Phi Sigma Pi also has held fundraisers for such organizations as the American Heart Association, American Cancer Society, Arthritis Foundation, Cerebral Palsy Foundation, Autism Awareness and Muscular Dystrophy Association.

***3.0 GPA only
required to become
a Member, not
needed to stay a
Member.*

Social events are an integral part of Phi Sigma Pi activities. National events include National Convention that includes a leadership training, awards banquets and Grand Chapter Business. On a more informal level, Phi Sigma Pi Chapters hold annual banquets, awards dinners, movie nights, alumni picnics, trips to other Phi Sigma Pi Chapters and countless other activities that help unite the Members of Phi Sigma Pi.

Obtaining Membership

The National Constitution requires a minimum cumulative grade point average of 3.00 on a 4.00 scale (A= 4.00). Students who have completed at least one term of college work are eligible for membership in Phi Sigma Pi.

Introducing the Initiation Program

It is important when introducing the organization to new people that you introduce the Chapter's Initiation Program. Outline the Initiation Program so Potential New Members have an idea of what will be expected of them.

This will help to eliminate a situation where a person enters the Initiation Program under false pretenses. If people are made aware of the program's content before they enter it, they can decide prior to committing themselves if they feel comfortable with the program. This will help eliminate misunderstandings and prove that we have nothing to hide.

Let them know when the Pinning Ceremony is, explain that there is an Initiation Program, and give them the date for the induction ceremony. Explain to them that the initiation period is a time of acclimation-it not only gives the organization time to evaluate whether or not they would make a good Member, but for them to determine whether or not this organization is for them.

Two Easy Steps for Success

There are two steps that need to be taken to ensure that the PNM's first introduction to the Initiation Program is successful:

1. The entire Chapter must be familiar with the Initiation Program and calendar of events. Each Member must be able to articulate the values of each event. Active Members must also be able to answer questions regarding initiate requirements and responsibilities consistently. It is very discouraging, and it looks bad, when active Members cannot answer simple questions about the Initiation Program and what is expected of the Initiates during the program accurately or with consistency.

2. Most of all, the program must be presented as a conceptual outline. Never list or dictate specific requirements when the program is first introduced. Try to tie the goals of the program together with the activities to put things into perspective.

Use the following example to introduce the Initiation Program at the Invitational Meetings to any prospective who asks for greater detail on the Initiation Program itself:

“During the course of the Initiation Program, we will work to accomplish the following goals:

1. Learn about each Member, fellow Initiate and yourself.
2. Get to know Chapter’s Alumni, honorary and faculty members.
3. Learn about the Chapter Bylaws, National Constitution, both local and National history, the National Officers and other Chapters of Phi Sigma Pi.

You will have access to ***The Scholar's Province***, the new Member handbook, and handouts on the Chapter history. At the end of the program, you will be tested on your knowledge of this information.

4. Learn about the college/university and community.

By organizing your own event, you can see what needs exist in the community. You will learn about the university and community as you work side by side with us at the fundraisers, service projects and professional programs.

5. Develop pride and dedication to Phi Sigma Pi. Once you have seen how much all of the active Members care about the organization, and after you have had a chance to participate and learn with us, you, too, will develop a similar pride and respect. In honor of the organization, we all wear letters on the 14th day of every month in honor of the organization’s founding.
6. Be introduced to leadership situations and placed in positions of responsibility.

As scholastic leaders on campus, we have a responsibility to academics. Therefore we will have several designated group study periods. You will also have the opportunity to be leaders

by organizing your own event, and you will be responsible for attending and participating in Chapter-sponsored events, meetings and programs.

7. Learn how the organization works and what it does. By participating in Chapter events, from planning stages through actual completion, you will get an inside look at how we work and why we participate in certain events. Each week you will have the opportunity as a group to meet with the Initiation Committee to discuss any questions you may have.
8. Be placed in fellowship-building activities.

We will have social events, such as; organization meals, movie nights, etc. We will assist you in learning the organization songs.

9. Be taught local and national unity.

You will have the chance to work with us as a team ... a cohesive unit. You will decide on a class name, symbol and president so you feel like a team. You will see how the Chapter works with the National Headquarters and other Chapters as a part of a national entity.

By simply stating the goals and the methods used to achieve them, the Potential New Members will have enough information to decide if they are interested without being turned off. In fact, you will be surprised how many people you turn on to Phi Sigma Pi when they see how organized you are, your goals and methods having been clearly and simply illustrated.

The time to get detailed about the specifics of the program is after the Initiates have been pinned and are committed to the program.”

It is important to remember that these are only guidelines and you should include local projects, awards, honors or items of interest from your Chapter.

Don't Use High Pressure Tactics

Much of selling is psychological and done very subtly. High pressure tactics only work on the easily intimidated and only for the moment they are applied. Most people will make an intelligent decision based on careful thought, comparison and research. Some will make a decision based on gut instinct from what they have seen and heard. Be honest

and open. Make Phi Sigma Pi feel right to any serious Prospective New Member.

There are literally hundreds of students on your campus who want to be part of something special. You just have to find these students and inform them that your Chapter will meet/exceed their needs and desires.

Selling Phi Sigma Pi is everyone's job. Everyone must be at all recruiting events. Not having some of the Chapter members at recruiting events (and the Invitational Meeting) reflects poorly on the organization. Show your best side, make a good impression with total participation and sell Phi Sigma Pi.

SELECTION OF PROSPECTIVE MEMBERS

We are striving for dedicated, knowledgeable, trustworthy and caring future Members. Chapters cannot survive on ideas alone, they must have dedicated Members. As a good planning procedure, Chapters are required to hold an Initiation Program twice each academic year.

No matter how well-planned the Chapter Initiation Program may be, the Chapter needs to attract a sufficient amount of eligible students to its Invitational Meetings. The Chapter must realize that it is better to have too many interested students than not enough.

As discussed earlier, the organization is much like life itself. The Chapter's survival depends upon recruitment to perpetuate itself. Recruitment is an ongoing, everyday process which takes work, planning and trying to measure the potential of these individuals. You are trying to get the best people for the Chapter. Realistically, not everyone in the Chapter will like every prospective equally, so be flexible. Of course, a large majority of the Membership having some knowledge or opinion is legitimate cause for not accepting someone into your program, but do be objective and listen for reasons behind opinions.

Strength in Numbers

Chapters should be strategic in creating a long-term growth plan. It is a naive and poorly-informed Member who feels a large Chapter is a bad Chapter. The old cliché, "there is strength in numbers," is still valid. Greater numbers provide greater resources and greater potential. Large numbers can only cause problems if Chapter communications and management are poor; or if the Initiation Program is not making quality out of the quantity, at which time these areas must be strengthened and improved. Another significant advantage of a large Chapter is its ability to absorb unstable influences with little harm to the Chapter. Larger Chapters stand a better chance of surviving the effects of graduation,

attrition, inactivity and more than half of the fifteen reasons Chapters go inactive.

Equal Representation

Membership balance is critical to the Chapter's long-term stability. Particularly, it is essential that the Chapter attempts to have equal representation between new students, sophomores, juniors and seniors. Having too many juniors and seniors presents the risk of the Chapter dying out in two years due to insufficient numbers of underclassmen, or older Chapter Members can present a situation where Chapter leadership, knowledge, traditions and operations can be easily lost. Balancing the Chapter composition is a difficult process and is never completely attained.

Obviously, if a Chapter is having trouble recruiting new members, the Chapter should admit all eligible candidates into their Initiation Program, regardless of whether they are new students, sophomores, juniors or seniors. The Chapter needs the people in order to survive. However, when a Chapter has at least forty (40) people who definitely want to join and enter the Initiation Program (this does not mean after your first Invitational Meeting, but rather all those still interested after your Invitational Meeting or recruitment program), then the Chapter can afford to be selective. This is where planning is key.

Lots of Interested People?

What do you do when you advertise and get a sizeable number of people at your Invitational Meeting who wish to join? If you have more than forty people that definitely want to enter the Initiation Program, invite these interested people back to additional meetings/events where your Chapter can get to know them better. Normally, one or two events will be needed to make your decision.

Voting on Prospective New Members

Initiates are chosen from the group of Prospective New Members (PNM). All Members who can make the selection meeting will determine the Initiates for the semester/quarter. Those Members who do not attend the selection meeting are not permitted to vote. No votes submitted by proxy will be accepted. The meeting's purpose is to allow Members to share their insights into the Initiates' qualifications. PNMs should be given a chance to become Initiates unless something has occurred to indicate that a certain PNM would not be a good Phi Sigma Pi Member that term.

Discussions should take place prior to casting the vote for each PNM. The Chapter should follow the procedure outlined in Robert's Rules of Order when conducting the discussion session. By using the procedure

of Pro/Con (pro, con, pro, con, con, pro) the Chapter will prevent a discussion period that becomes a gossip session. The Chapter should limit the time and the number of comments made by the Membership so that each comment brought to the floor is seriously considered.

Also stated in the National Constitution, Article IV, Section 7:

Phi Sigma Pi Members in good standing may nominate qualified individuals to become Collegiate or Honorary Members. Voting shall be by ballot and shall be completed at least forty-eight (48) hours prior to the scheduled Ritual Induction Ceremony at a prior called meeting with quorum and with notice of voting on the meeting agenda. No less than forty-eight (48) hours notice shall be given for this meeting. At least a three-fourths (3/4) vote of the Active Collegiate Members in good standing present and eligible to vote at the meeting with quorum shall be required for confirmation.

When there is doubt in any particular area concerning the guidelines stipulated by the Chapter (in accordance with national guidelines), all personal prejudices must be removed from the discussion. Judgment should be based upon facts only.

The Meeting Commencement Ceremony - provided in *The Phi Sigma Pi Ceremonies and Ritual* book- should be read at the beginning of Chapter meetings where voting takes place. There should be a white rose at the front of the room to remind Members that voting takes place in Subrosa. This reminds the Membership of the importance of and the confidentiality that must occur in the voting process.

Once the voting and the Pinning Ceremony is complete the Initiation (education) Program begins. While the Initiate Advisor is responsible for the program, all Members are responsible for its success.

Member Responsibilities

It must be understood that the initiation process is a time when the Membership exemplifies what it can contribute to the Initiates. It is important that Members recognize their responsibilities.

1. Attend and participate in recruiting and initiation events.
2. Represent Phi Sigma Pi by setting a good example at all times.
3. Do not degrade Initiates with any type of physical, mental or emotional hazing practices.
4. Use a positive reinforcement approach rather than a negative avoidance (fear) technique.



** "Judgment should be based upon facts only"

5. Ensure that the Initiates enjoy being part of Phi Sigma Pi and lend encouragement whenever possible.
6. Tutor and assist Initiates in need of scholastic improvement or see that they get the appropriate assistance from another Member.
7. Talk personally with each Initiate about Initiate work, scholastic progress and the ideals of Phi Sigma Pi in preparation for initiation.
8. Take an active and concerned interest in each Initiate as an individual, their personal life, outside interests, family, friends and previous background.
9. Take an active interest in the growth and development of each Initiate so they will appreciate Phi Sigma Pi and benefit from mutual experiences and association.
10. Realize that the Initiates are individuals. It should be expected that the Initiates will maintain their own beliefs and values. Phi Sigma Pi is an organization for the individual that thrives on diversity.

Active Members can be involved by:

1. Becoming a Big Brother.
2. Attending social events.
3. Attending study sessions.
4. Encouraging other Members to participate.
5. Serving as a Member of the Initiation Committee.
6. Going with Initiates to athletic and cultural events.
7. Acting as a discussion leader during weekly initiate meetings.
8. Conducting special seminars for the Initiates before major exams.
9. Participating in public relations projects, service projects, fund-raisers, etc.
10. Encouraging Members and Initiates to spend time together or attend football games, amusement parks, the movies, etc.
11. Planning periodic talks between Members and Initiates to understand each others' thinking about Phi Sigma Pi, Chapter concerns, new ideas, etc.

Encourage Interaction

As you can see, there are many ways to ensure active participation from the Members in Initiate training activities. The Initiate Advisor plays the role of a motivator and an organizer. Often, the Initiate class itself will generate ideas which demand the Members' participation for them to be successful. Encourage the Initiates to come up with unique ideas. You might also want to dedicate part of the Chapter meeting to generating

ideas from the Members themselves for ways they might become involved in the Initiation Program.

The Role of the Initiate

What is an Initiate?

Within Phi Sigma Pi, we refer to new members as Initiates rather than pledges. The word pledge is a verb, but when used as a noun oftentimes denotes a degree of subservience; therefore, the National Council has adopted the term Initiate. By advocating the equality between Initiates and Members, we assert that friends who aspire to share Membership unity cannot tolerate false levels of authority. Authority and respect may be earned but never demanded. The organization teaches us to respect each other for who we are and to work together. Fraternalism finds strength in innovation and creativity. The traditional line drawn between Members and Initiates, however, hinders the dynamic interaction and personal growth which are essential for a successful organization.

Most agree that Initiates need to learn Chapter and National organization and history. They are expected to behave responsibly and participate in meetings and functions. We want them to become friends with all Members. We want them to become committed to the organization's progress, prosperity, and ideals.

Provide the Facts

Each Chapter will stress different areas and develop different traditions. There are principles which, if respected, will help guarantee that newly initiated Members are knowledgeable, enthusiastic, and responsible toward the organization and are committed to making Phi Sigma Pi increasingly dynamic.

For each Initiate to be able to determine whether they truly want to be a Member, and for the Members to be sure each Initiate will fit into the group, they need to evaluate one another. To objectively evaluate each other, the Initiates must be included in the mainstream of Chapter operations.

If we lead an Initiate to believe that the organization is the ideal Chapter, after initiation they see the previously concealed weaknesses, they might feel cheated, possibly resentful, and certainly less committed. However, if we have shown the Initiate the honesty and respect due to a friend, they will enter the Membership with the orientation necessary to help the Chapter make the most of itself. Furthermore, if despite fostering mutual appreciation and respect, the Initiate has not performed well, the Initiate is probably not going to be an exemplary Member.



***Initiates to be in mainstream Chapter operations*

Remember this axiom: Initiates reflect as Members what they saw in the Members as Initiates. We are all teachers and should behave and instruct in a way that encourages respect and emulation by both peers and pupils. A good teacher has students who work for encouragement and constructive criticism. A poor teacher has students who are scared into doing enough "to get by." Consider your methods of motivation.

The Chapter's Position on Initiates:

1. Initiates are important to the survival of every Chapter.
2. Initiates are the purpose behind creating an educational and enjoyable Initiation Program.
3. Initiates are part of the Chapter, not outsiders.
4. Initiates are not just people who pay their dues and fees. They are human beings with feelings like our own.
5. Initiates are people who come to us with needs and wants. It is the Chapter's responsibility to help fill those needs and wants.
6. Initiates deserve the most devoted attention we can give them. They are the life-blood of this and every Chapter. Without them, Phi Sigma Pi would not survive.

Initiation Should be Fun While Providing a Challenge

While the Initiation Program should be fun for Initiates, it should be meaningful and taken as a serious responsibility. Creative programming can turn a dull, apathy-ridden program into something rewarding. Effort and planning are essential. An Initiation Program should undergo continual evaluation and revision, as should a Chapter, if stagnation is to be avoided. You must think about and create a program which best suits your and the organization's purposes. Many Chapters cling to "tradition" as an excuse to keep poor programming, but this must change.

If Members consider initiation as the beginning of an exciting, lifelong experience, rather than the end of a boring ordeal, you will have the enthusiastic, unified membership you desire. If you create this atmosphere in the Chapter, success will be your result. Your dedication and excitement will radiate to Potential New Members. You will meet and exceed your goals -- scholastic, service and social. You will have the attitude that makes a Chapter number ONE!

Rights and Responsibilities of the Initiate

People do not want to be part of an organization that they cannot respect nor do they want to be part of an organization that does not respect them. Phi Sigma Pi believes that Initiates who are treated with respect and in a constructive manner during the Initiation Program tend to make Members who respond more maturely to the duties and responsibilities of membership. An organization is a two-way street: the

group must give something to the individual and in return, the individual must give something back to the group.

An Initiate is a novice and, therefore, is justly limited in the ability to influence organization policies, practices, decision-making and activities. This is because the knowledge of the Initiates is incomplete, their talents are untested, and their experience is devoid. However limited the influence of the Initiates may be, they still have certain basic rights to which all Members of the organization are entitled.

The Initiates never surrender any of their social or legal rights. The only thing that changes when individuals enter the Initiation Program is that they have assumed new responsibilities. All Initiates have the right to expect mature and responsible behavior from the active Members, as long as the Initiates conduct themselves in a similar manner.

Membership in Phi Sigma Pi does not require the Initiates to submit to undignified, humiliating, or degrading stunts. There is no place in Phi Sigma Pi for hazing, mental harassment, or any other activities which some other organizations unfortunately have used in the past. The National Constitution (Article XXI Section 1) defines hazing and the ramifications for any Chapter and/or individual that participates in this type of destructive activity. Phi Sigma Pi means too much to too many people to have its future destroyed by irresponsible acts devised with little foresight.

While each Initiate deserves the same consideration and respect as does any active Member, this in no way implies that the initiate is immune from discipline. Chapters must enforce rules and policies intended for the benefit of everyone. If an individual does not observe these regulations, this person should expect to be corrected or disciplined if the situation warrants. This can be as simple as a verbal warning from a Chapter Officer or as final as termination in the Initiation Program or termination of membership by the Chapter.

An Initiate's Bill of Rights

1. The right to be treated as an individual.
2. The right to be fully informed about the Initiation process. This includes dates, locations and intent of all required Initiation events, quizzes, the Phi Sigma Pi National Membership Exam and Induction in advance.
3. The right to ask questions and receive true and objective answers from Members and Staff.
4. The right to be treated with respect.

5. The right to be treated as a capable and mature person without being patronized.
6. The right to have and express opinions to Members and Staff.
7. The right to have inviolable confidentiality when sharing information with Members and Staff.
8. The right to make informed choices without undue pressure from others.
9. The right to make one's own choice and decision and accept full responsibility for the results of that decision.
10. The right to have a positive, safe and enriching recruitment and membership experience.

Feedback Process For Initiates

An effective feedback ensures that every Initiate receives fair treatment and support during the Initiation Program. It includes a series of intentional steps to make sure that Initiates are well-informed about expectations, provided clear and timely feedback and allowed the opportunity to make improvements when needed. An effective feedback protects the Initiate and it also protects the Chapter.

Make the Guidelines Clear

The most far-reaching step to ensure that the Initiate class stays within the guidelines of the Initiation Program is to clearly outline the expected guidelines. You cannot expect the Initiates to follow the rules if they are not familiar with them. The ideal time to communicate these guidelines is on the first day of the Initiation Program. Each rule and obligation should be communicated, and the rationale behind each should be explained. Again, this forces the Initiation Committee to evaluate the obligations and responsibilities and decide if the purpose is justifiable and the method is positive. A list of the responsibilities and the objective of each obligation should be distributed.

The Chapter has now taken the first essential step toward producing an informed Initiate class. Although this may be the case, problems with some individuals may arise. If this situation occurs, each Chapter must exercise good judgment and follow a set format to ensure fairness and due process. Remember that if an Initiate is not fulfilling the responsibilities during the Initiation Program, they may not contribute as an active Member. Because all situations are different, a standard format for disciplinary problems must be devised to ensure that all Initiates are handled fairly and without personal bias.

Evaluate Progress Consistently

The Initiation Program should be a fair process for everyone. It's important to make sure that the process of evaluating Initiates and the



criteria on which they are being judged are consistent. Utilizing the Characteristics of an Ideal Member will ensure a standard for all Initiates and limit the potential for bias to interfere with the evaluation process.

See the Characteristics of an Excellent Member resource linked in the Additional Resources section in the back of this manual.

Provide Timely Feedback

Providing Initiates with timely constructive feedback regarding their progress throughout the Initiation Program is key. All Initiates must receive feedback at least once, which would ideally happen during Midway Review about halfway through the Initiation Program. Feedback should be provided anytime an issue arises that may impact an Initiate's success or the final vote.

Allow Time for Improvement

It's imperative that an Initiate who receives constructive feedback have adequate time to make improvements. The Initiation Program is a time of learning and development for Initiates, and there may be times when an Initiate struggles. Providing an opportunity for an Initiate to improve will allow them to demonstrate their ability to overcome challenges and their commitment to becoming a Member. If an Initiate has not received feedback regarding a particular issue, that issue should not be raised during debate or considered in the final vote.

THE BIG BROTHER PROGRAM

Involve the Chapter

The most effective way to orient the Initiate to the Chapter is through contact with the "Big Brother." This personal relationship breaks down the class and Chapter status barriers that naturally develop. It is much easier for newcomers to relate their concerns and frustrations to somebody who cares about them as individuals. Also, there is a much deeper commitment to help the new individuals when a person-to-person relationship exists rather than simply an Initiate-Chapter relationship.

The Big Brother program is another tool which will prove invaluable in involving the active Chapter; a significant percentage of actives is directly involved with the Initiates. Becoming a Big Brother should be considered an honor among the Chapter Members. This is an attitude essential to the program's success and must begin to be fostered early in the term as Initiate Advisor.

Selecting Big Brothers

There are several methods to use in choosing who will be Big Brothers, and to whom the Big Brothers will be assigned. The best methods involve input from both Members and Initiates. However, it is important that the final decision rest primarily with the Initiate Advisor. This is one of those areas where you must exercise your authority. In doing so, you will avoid some of the issues encountered in certain Chapters over Big Brother selection.

The first action to be taken when selecting Big Brothers, as Initiate Advisor, is to act as a Big Brother to all Initiates and not be a Big Brother to any single Initiate. Apart from this, selection of Big Brothers should be made wisely with these factors foremost in your mind:

1. Use Members who want to be Big Brothers.
2. From that group, select Members who are not currently Big Brothers. If you still need Big Brothers, use Members who have only one little brother. Continue in this manner until all Initiates have a Big Brother. Consider selecting Members who graduate at the end of the semester/quarter and the senior-most Members if you still need Big Brothers.
3. The Initiates' preference - first, second, and third choices.
4. The Member's preference, both as to who wants to be a Big Brother and as to which Initiate they prefer.
5. Personal insights into the particular strengths and weaknesses of the Members, and to the best of the Initiate Advisors and the Initiation Committees insights into the strengths and weaknesses of the Initiates. (Here, you would probably be advised to seek the counsel of the actives who know the Initiate in question the best.)

Matching Big and Little Brothers

In selecting the Big Brother, criteria for an objective method of selection should be established. The big-little relationship can be mutually beneficial, or the Initiate and/or Big Brother can reinforce the other's positive characteristics. Also, not every Member makes a good Big Brother, so in cases where there are not enough Members to go around, a Big Brother might be assigned two or more Initiates. A few factors to consider when selecting Big Brothers are:

- Will the Big Brother set a good example?
- Do their personalities complement each other?
- Did the Initiate and Member request each other?
- What similar extracurricular interests are shared?
- Will the Big Brother be a positive influence academically?

With these things in mind, the Initiate Advisor and the Initiation Committee can match actives and Initiates in the Big Brother relationships. This will not be easy. Because you cannot please everyone, be as wise in your decisions as you can, but do not be swayed from your best judgment for counter-productive reasons. An example is the influential senior who demands and expects a certain Initiate as their little brother but who will not devote the time and energy needed to make the relationship a success. Also consider the Chapter Officers. Do not make an active Member a Big Brother just because they are an officer. Use your judgement wisely. Have the Big Brothers fill out the applications and just try to match big and littles with similar interests.

New Members Make Terrific Big Brothers

Whenever possible, you should enlist new Members as Big Brothers. Doing so not only effectively integrates them into the Chapter, but it also utilizes their enthusiasm for the Initiation Program, since initiation was a recent experience for them. They will have a great understanding and empathy for the Initiates. These qualities are crucial to the success of any Big Brother.

Having made your decision, you should be willing and able to discuss your choices with anyone who wishes to, after the fact. Put enough thought into your decision so that you can support it adequately. This may be one of the first real tests of your authority--be prepared!

The Big Brother's Role

Your Initiation Program will run smoother if the big and little brother have a good relationship.

The role of the Big Brother is threefold:

1. Responsible for acclimating the Initiate to Chapter life and other active Members.
2. Responsible for ensuring that the Initiate learns about Phi Sigma Pi and your Chapter through *The Scholar's Province*.
3. The Big Brother should assist the Initiate Advisor. The Big Brother should be your prime liaison between you and each individual Initiate. You should always be able to fall back on a Big Brother for counsel as to the Initiate's attitude, feelings, etc.

Big Brothers Should Know Their Duties

Before becoming a Big Brother, each Member should be made aware of the responsibilities that accompany the position. Some responsibilities include:

1. Meet with the Initiate at least once a week.

2. Act as a close friend to the Initiate on a daily basis.
3. Accept the responsibility of a Big Brother and serve as an inspiration to the little brother.
4. Monitor the Initiate's scholastic progress and provide them with proper assistance when needed.
5. Help the Initiate integrate into the Chapter by teaching about Phi Sigma Pi and motivating the Initiate to accept responsibilities and fulfill the Chapter obligations.
6. Help the Initiate to meet other Members in the organization.

Be Warned

Precautions should be taken to ensure the success of the Big Brother program. Below are several guidelines to help direct a successful program:

1. If a Big Brother is not performing the role adequately, the Initiate Advisor and Initiation Committee should first address the Big Brother in question and if no changes occur then consider replacing the Big Brother or making the necessary adjustments.
2. Hold four (4) Invitational Meeting⁸ of all Big Brothers to discuss various concerns encountered in the relationship.
3. Each Chapter should use The Big Brother Ceremony where the Big Brothers promise to fulfill their obligations. A Chapter can develop specific guidelines. The purpose of this ceremony is to emphasize the Big Brother's role in the education process.

PHI SIGMA PI'S STANCE AGAINST HAZING

Building a Strong Initiation Program

In establishing goals, you must realize that the goal of the Initiation Program is not to make better Initiates, but rather to ensure that these Initiates will be engaged Members after their induction into Phi Sigma Pi. All you simply need to know about the Initiates is how they will function as active Members. Use the following steps to build a stronger Initiation Program:

1. Realize the program can always be improved upon (remember the words of The Ritual!). Analyze your present program and decide how productive it has been.
2. Include the productive activities and educational developments in the program. Use the strong aspects of your program to build your new program.
3. Discard your old program and get Members involved in creating a new Initiation Program. Divide Members into groups and have them brainstorm productive activities for the Initiation Program.

4. Combine ideas and sort through similar or non-productive ones. Once you have a productive list, let Members vote on good ideas from that list.
5. Calculate and choose a program. Determine from the votes which program that is most productive.
6. Enforce the program and have restrictions and discipline procedures for Initiates who do not fulfill the Initiation Program's requirements. However, as there are excused absences for Members, so should there be for Initiates.

Follow these procedures, and your Chapter should be able to establish a strong, safe and productive Initiation Program.

More and more incidents of hazing on college campuses are making their way into the headlines and into courtrooms. Once accepted as the harmless antics of immature college students, hazing incidents are getting Chapters suspended, organization officers sued and individuals getting jail time.

The Course of Action


The National Council realizes that the majority of the active Chapters conduct responsible and inspiring Initiation Programs and induction ceremonies and has not done, is not in the process of, and will not become involved in anything that even remotely could be considered "hazing" or in violation of Phi Sigma Pi law or policy. Nonetheless, there is a definite necessity for an increased vigilance, awareness, dedication, and determination in this matter.

There are Chapters in Phi Sigma Pi where *The Ritual* and its purposes and procedures are not followed to the fullest. Instead, questionable, contradictory or wasteful activities are taking place during the Initiation Program. In confronting this problem, the following basics are pertinent:

Phi Sigma Pi, in stated goals, purposes, and achieved results, is a positive experience, designed to be contributory and beneficial throughout a person's life.

The purpose of Phi Sigma Pi is to be uplifting, motivating, value-setting and enjoyable in a constructive way.

The heart of Phi Sigma Pi is found in Membership, personal association and involvement, and an obligation of every Member to help each other to achieve. It is in the context of positive emphasis and guidance that the following guidelines will apply, and are to be used in determining and conducting any of the activities in the Initiation Program.

 **Initiation Program Curriculum Guideline for Foundational Program

Applicable Guidelines

- We allow each student time for academic responsibilities, reasonable sleep and reasonable campus involvement. Potential New Members are in school for an education, a learning experience, both in and out of the classroom.
- Whatever is performed or allowed to happen must be fully consistent with the ideals and spirit of *The Ritual* and governing laws. The lessons of the traditions noted above involve more than "I had to do it; therefore, they should, too."
- If it is done only for "the fun of the active Members," the odds are very high that the activity should not take place.
- People do not go through an Initiation Program to be in servitude to an individual Member. They are aspiring to be Members of the Chapter and the organization.
- If something is designed just to make a person "a good Initiate," rather than to make a good Member, or just to see "how much he wants to become a Member," it is not appropriate.
- Ask yourself, "Would I be able to share this activity with campus professionals? National Staff? Family?" If the answer is no, chances are very strong that it is wrong.
- Forced unity or "unity-at-any-cost" can, often unknowingly, result in resentment or exaggerated competition against the Chapter and conflict with the Initiate class's later integration into the Chapter, creating a caste system. Unity will occur from shared experiences.
- If instilling humility is the only or major purpose of what is being done, it should not be done.
- The fact that "we've always done it" does not, by itself, justify its continuance.
- If an activity became known and/or publicized, could it really be explained, justified, understood or appreciated by parents, university officials, or potential Initiates? If not, you may want to re-evaluate its purpose.

Prohibited Activities

Actions and activities which are explicitly prohibited include, but are not limited to, the following:

- Assigning an activity that would be illegal or unlawful or would constitute theft, burglary, trespassing or be morally objectionable to the individual Initiate.
- Any activity that would be potentially harmful to the individual or would endanger life, such as swimming in rivers, jumping from high places, drinking contests, electrical shocks, or simulated or actual branding.
- Forced or required consumption of food, alcoholic, non-alcoholic beverages and/or other objects or liquids.
- Creating excessive fatigue, forceful participation in an activity, extreme physical or mental abuse, or exercise beyond normal ability.
- Taking or destroying any article belonging to another (Initiate, Member, or other individual).
- Kidnaping, transporting, and/or stranding anyone without their knowledge.
- Nudity, lewd behavior, or requiring anyone to perform acts involving the genitalia.
- Yelling and screaming abusive language for the purpose of harassment, or any activity without a constructive purpose.
- Intentionally creating clean-up work.
- Forcing Initiates to wear embarrassing or uncomfortable garments in public.
- Creating rooms or areas that are uncomfortable due to temperature, noise, size or air quality purely for the purpose of harassment, such as sweat boxes, freezers, etc.
- Physical activities while reciting material.
- Physical assault, such as pushing, shoving, tackling, paddling, of Initiates
- Waking Initiates during the night

The above list of activities is not condoned or acceptable according to Phi Sigma Pi standards and policies.

Policy on Hazing (According to the National Constitution)

Phi Sigma Pi will not tolerate hazing, especially during the Initiation Program. According to the National Constitution:

ARTICLE XXI, Section 1 -- Phi Sigma Pi National Honor Fraternity neither approves of nor shall be responsible for actions of

Members which may result in injury to persons or damage to property (i.e., "hazing"). Hazing shall be defined as any action or situation that recklessly or intentionally endangers the mental, physical or emotional health or safety of any individual, regardless of the person's willingness to participate. These actions and situations include, but are not limited to: paddling in any form; creation of excessive fatigue; physical and psychological shock; scavenger hunts which involve illegal activities; one-way road trips which leave an individual to find return transportation; wearing apparel at any time or location which is not appropriate; required engagement in public stunts or buffoonery; morally degrading games or humiliating activities; compulsory consumption of any alcoholic beverages or controlled substances or non-controlled substances; the destruction or removal of any public or private property; any activity that could adversely affect the mental, physical or emotional health of the individual; and any other activities which are not consistent with the regulations and policies of the sheltering institution, or behavior considered as unbecoming of a Member of Phi Sigma Pi. The National Council shall investigate any Chapter or Member accused of hazing. A Chapter or Member found guilty of hazing shall be disciplined in accordance with ARTICLE XVIII, Sections 2 and 3 of the National Constitution, if the investigation conducted by the National Council (or designee) determines that there shall be a reasonable basis that violation of this Article has occurred. Additionally, Chapters and Members are criminally and personally liable for the respective actions taken. The National Council may pursue the appropriate legal action against any Chapter or Member that hazes.

Anti-hazing Policy

Phi Sigma Pi National Honor Fraternity neither approves of nor shall be responsible for actions of Members which may result in injury to persons or damage to property (i.e., "hazing"). Hazing shall be defined as any action or situation that recklessly or intentionally endangers the mental, physical or emotional health or safety of any individual, regardless of the person's willingness to participate. These actions and situations include, but are not limited to: paddling in any form; creation of excessive fatigue; physical and psychological shock; scavenger hunts which involve illegal activities; one-way road trips which leave an individual to find return transportation; wearing apparel at any time or location which is not appropriate; required engagement in public stunts or buffoonery; morally degrading games or humiliating

activities; compulsory consumption of any alcoholic beverages or controlled substances or non-controlled substances; the destruction or removal of any public or private property; any activity that could adversely affect the mental, physical or emotional health of the individual; and any other activities which are not consistent with the regulations and policies of the sheltering institution, or behavior considered as unbecoming of a Member of Phi Sigma Pi.

THE INITIATION PROGRAM

Purpose of the Initiation Program

The Initiation Program is a time of learning. It is also a time when both the Initiate and the Chapter have the opportunity to assess whether or not Phi Sigma Pi is the organization for the Potential New Member. If the Initiate is to reach full potential as a Member and leave a mark in the national organizations history, the Initiate will need to have a complete and balanced understanding of the organization very early in the association with Phi Sigma Pi. The Initiates need to know the nature of the group, understand its goals, and learn how it functions by experiencing it for themselves.

The main purpose of the Initiation Program is to prepare the Initiates for active membership in Phi Sigma Pi. Every new member of Phi Sigma Pi must be completely prepared for the duties and responsibilities that membership demands. The leaders of tomorrow must be able to handle Chapter operations today to ensure the organization's continued success. To this end, the National Council has established the following guidelines. The guidelines should become both the Initiates' goals and the Chapter's goals for the Initiation Program.

1. Become acquainted with the Chapter's Alumni and honorary members and Advisor(s).
2. Learn all you can about each Member and fellow Initiate.
3. Learn the National Constitution and Chapter Bylaws.
4. Become familiar with the names and faces of the National Officers.
5. Know the locations of other Phi Sigma Pi Chapters.
6. Learn about your college or university as well as the surrounding community.
7. Develop pride in and dedication to Phi Sigma Pi.
8. Introduce yourself to situations requiring leadership.
9. Place yourself in positions of responsibility.

10. Learn how the organization works as well as the purpose and ideals of Phi Sigma Pi.
11. Involve yourself in fellowship-building activities.
12. Help develop national and Chapter unity.
13. Learn National and Chapter history.

The Initiation Program is meant to be a process of learning, inspiration, cohesiveness and achievement -- not degradation, humiliation or hazing. All Members must continually earn the privilege of membership in Phi Sigma Pi, not just Initiates. While each individual must earn and deserve the privilege of membership in Phi Sigma Pi. This must be accomplished in a positive, character-building, dignified and constructive manner. Although each Chapter differs as to how its Initiation Program strives to achieve the aforementioned goals, its requirements and policy must be in agreement with the National Constitution.

Additionally, because the Chapter exists within the framework of the collegiate institution, it is reasonable for the Chapter to require that all Initiates have a working knowledge of the school's history and traditions. The Initiation Program is a time of doing, participating, working, thinking and achieving. If an Initiate cannot master the minimal yet essential obligations required by the Initiation Program, then the Chapter is justified in assuming that the Initiate's sincerity and desire are superficial and that the Initiate is not yet ready for the greater obligations and responsibilities of active membership. Following due process will be important.

Developing the Initiation Program

If the Initiation Program is to act as a selling point during recruiting, the program must be a good one. There are some fundamental premises upon which any Initiation Program must be based. If you remember that the Initiation Program should educate and develop, then it relieves the Chapter from pursuing some of the more questionable activities.

The following concepts are critical to designing a positive Initiation Program. The Phi Sigma Pi National Office has created a [Curriculum Guide for the Initiation Program](#). Completing the program this way makes sure that your Chapter is following the guidelines and National Constitution.

Consistency

If Initiates are expected to benefit from the Initiation Program, it must be organized. The best way to ensure continued organization, especially during officer transition, is to have a written program. Although this manual and The Curriculum Guide will serve that purpose, each Chapter

***Curriculum Guide
is the IA's
teacher's manual*

will have additional information that will no doubt need to be communicated and preserved.

The Initiation Program should be regular and consistent in regard to the expectations and mechanics. Initiate meetings should be held once a week, and Initiate activities should be divided to achieve an equal time commitment each week. By accomplishing this, the Initiates will be able to plan their time accordingly while also participating in other college activities.

Clarity

Although the Initiate was provided with a brief outline of the Initiation Program during recruiting, you must now expand upon that. Distribute a timetable and calendar of events, responsibilities, and expectations to each Initiate. If this is done at the onset of the program, you have further ensured that the Initiate fully understands the responsibilities and can effectively plan to actively participate.

When designing a new program or evaluating an old one, you must continually ask yourself: What are the goals of the Initiation Program, and are positive methods to achieve these goals being used? If these questions can be answered appropriately, then the rationale for all activities will be sound.

Chapter Approval and Commitment

The success of the Initiation Program, like almost all Chapter undertakings, will rely on the Member's commitment. Chapter Members have to be informed and must have the opportunity to provide input and agree on the Initiation Program. (Per the Constitution)

Flexibility

Although the program must be regular and consistent, it cannot be so rigid that necessary changes become too burdensome. The best Initiation Programs are those that are constantly evaluated and able to change with the times. In the quest for a meaningful and successful Initiation Program, creativity is the key.

No Hazing

Hazing has different meanings to different people. Therefore, we strongly encourage you to evaluate the rationale for all Initiation Program activities and examine sections on hazing in this manual, the Anti-hazing Policy, and the university's policies. No list could possibly enumerate all potential activities that could be construed as hazing. If any questions and/or concerns should ever arise, please contact the National Headquarters (pspoffice@phisigmapi.org) immediately.

Challenge

If the Initiation Program is to be meaningful and cultivate dedicated new Members, it should be challenging. However, it should not be so challenging that Initiates must leave the program. On the other hand, it should not be taken lightly. The Initiates should learn to appreciate what they are joining. Support and challenge from the Membership will result in the Initiates gaining a sense of respect and appreciation for themselves as well as for Phi Sigma Pi.

Avoid "Rites of Passage"

When developing the program, aim for activities and actions to reinforce the assimilation of the Initiates and the Chapter.

National Requirements

The following is a list of requirements to be planned and/or completed during Initiation Program with the assistance of the perspective Committees and the Chapter.

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

**Example Tripod Event:
Working with local animal
shelter.

Scholarship – speaker
discuss the shelter or
relevant topic.

Leadership – create
dog/cat toys, blankets,
etc. to donate to the
shelter.

Fellowship – working
together during the
activities.

Involving the Initiates in Chapter Meetings

Communication is Crucial

The proper use of Chapter meetings is essential for involving the active Chapter and conducting a successful Initiation Program. We have already discussed several ways to involve the active Members directly and to shape their attitudes toward involvement. But these methods have been primarily for smaller group or one-on-one meetings. You have to bring it all together. The Chapter meeting is your golden opportunity to do so. It should be your focal point.

At the Chapter meeting, you will have the undivided attention of all your Members. Use that time to convey certain information about activities, times, dates of meetings, etc. It is important to keep the Members informed at all times. No one is going to remember fifteen (15) different dates if all you do is say them. You also have to post them. Get the Chapter Secretary to put them in the Chapter minutes, Chapter calendar, or other reports that gets out to the Members quickly. Use the Chapter group chats and distribution lists for reminders, but put it in writing first!

Initiates Should Attend Chapter Meetings

The Initiates should be attending Chapter meetings. They should be excused when the Chapter wishes to discuss the Initiation Program or the Initiates. The Initiates can and should become part of the Chapter mainstream. The most direct way to expose the Initiates to the organization is to include them in Chapter meetings and committee participation. Encourage enthusiasm by giving the Initiates a chance to help with all Chapter projects. The more involvement the new individual has in the Chapter's decisions, the more support will be given. Without this kind of responsibility, the Initiates will feel little commitment to the Chapter's activities and goals. Remember that we must give Initiates responsibility as Potential New Members if we expect them to accept responsibility as Members.

Be Prepared and Enthusiastic

Plan your report well in advance. Know what you want to say to the Members and try not to go off on tangents. Use the Chapter meeting to bring the enthusiasm that you have been trying to build to a peak; make your report something everyone can share. An Initiate Advisor should be a good public speaker. Advice as to how to rally a group is very difficult to give. You just have to try and let your own enthusiasm shine through. If you want others to be enthusiastic, you must be enthusiastic yourself. Above all, do not preach and do not take the negative approach.

All final decisions involving the Initiation Program or any part of it must take place in the Chapter meeting. However, you should take caution never to allow a surprise "issue" to be dropped on the actives in a meeting. As Initiate Advisor, you should be interested in promoting certain changes which may be of an emotional, innovative, and/or controversial nature. Make sure that everyone is aware of these ideas and has had a chance to think about and discuss them outside of the Chapter meeting. Initiation Committee meetings are a good place for this. Announce in advance the particular topic under discussion and invite all interested Members to attend.

Initiates on Chapter Committees

The Initiation Program is a time of observation, training and participation with the objective of developing future responsible members of your Chapter. Therefore, it may be desirable to formulate the Initiation Program in such a way that the Initiate may observe and participate in the various Chapter committees, such as public relations, scholarship, fundraising and service.

The observation period allows the Initiate to participate fully in the discussion and deliberations of these committees. This gives the Initiate a feeling of involvement and participation while providing the actives the opportunity to evaluate the sincerity and desire of the Initiate to become a responsible Chapter Member.

An Initiate who has observed the activities of several committees during initiation and who has received proper opportunity for responsibility should have a more effective transition from being an Initiate to becoming an engaged Member. This provides the Initiate with a greater awareness of the obligations and responsibilities expected in Chapter operations.

The Initiation Program has been outlined and provides study guides and the National Exam.



See the Curriculum Guide linked in Additional Resources section in the back of this manual.

EVALUATING, VOTING AND POLICIES

Feedback and Review

People like to know where they stand. If an Initiate does a good job, tell them so. If an Initiate is neglecting responsibility or there is a problem, that should be addressed. The worst thing you can do is to do nothing at all. If you plan an Initiate event, make sure Members see how well it was carried out, and tell the Initiates how they have done. It is demoralizing to an enthusiastic Initiate to complete Chapter requirements that no Member sees.

Improve your skills with Leadership in Action Modules:

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



Avoid Serious Trouble

It is the Chapter's right to have an Initiation Program that builds better Members, but it is also the Chapter's responsibility to minimize risk by settling problems early and properly. It is a National Policy that: Under no circumstances should an Initiate be expelled no less than forty-eight (48) hours prior to The Ritual: Formal Induction Ceremony. Doing so is simply asking for trouble. Several Chapters have fallen into the trap of procrastinating and avoiding disciplinary action and then voting an Initiate out just before induction. What follows next is a frustrated Initiate that emails the National Office and the university explaining how they have invested several weeks into the Initiation Program and at no time was told that they needed to improve or provided corrective measures.

The progress of Initiates should be reviewed at every regular meeting and at special meetings if specifically called for during the Initiation Program. These reviews set up a formal airing of concerns between the Members and the Initiates and provide a method of formal documentation if an Initiate is later removed from an Initiate class.

Under no circumstances should an Initiate be removed from the Initiate class without proper warning of the problem. In addition, the Initiate should be given ample opportunity to correct the problem before any action is taken by the Chapter.

Problems with an Initiate

If problems begin to arise with an Initiate, the Initiate's Big Brother, the Initiate Advisor or another Member who is close to the Initiate should speak privately with the Initiate. A more experienced Member should inquire to see if the Initiate understands the responsibilities. The Member should also investigate the possibility of academic or personal

problems. In most cases, this personal approach will remedy the problem by simply demonstrating that the Initiate's performance is being observed and that the Members are committed to the Initiation Program and the well being of each Initiate.

If problems persist, the next step is to have the Initiate meet with the Initiation Committee. The Initiation Committee should inquire into the Initiate's understanding of the responsibilities, academics, and possible personal conflicts. The Initiation Committee members must again relate the importance of the Initiation Program in preparation for active membership. At this time, the Initiation Committee should attempt to get a commitment to Phi Sigma Pi from the Initiate. The Initiation Committee should also explain the next step that will be taken if there is no improvement (see the following section).

Chapter Vote

If the situation does not improve, it is appropriate to discuss the problem in the Chapter meeting. The individual's name is to be brought up during new business. At this time, an open discussion concerning the Initiate should take place. After the meeting, the Initiate again is brought before the Initiation Committee. The Initiate is told that the situation has been discussed at the Chapter meeting.

Immediately after the meeting, the Initiate should be advised of the outcome of the Chapter discussion. If the Initiate is to remain in the Initiation Program, it must be understood that his/her/their actions will be closely observed and that any future concerns may result in being removed from the program.

If the Initiate is asked to leave the Initiation Program, the reasons should be thoroughly explained. In some cases, depending on the reason for asking the Initiate to leave the program, the Chapter may wish to encourage the Initiate to continue with the friendships that were made in the organization, but should understand that in no way are they entitled to the rights or privileges of a Phi Sigma Pi Initiate. The Initiate should return the handbook (*The Scholar's Province*) and Initiate pin to the Initiate Advisor.

In most cases, the procedures listed above should be more than sufficient when dealing with disciplinary problems. The process is thorough and fair to ensure that no rash or unjust decisions are made. The Chapter Members can safeguard themselves from potential problems if they analyze each Initiate's performance weekly. Do not let things fester or go unchecked. Start the disciplinary procedure as soon as problems arise. This will avoid major dissent among the Chapter

Members at the end of the Initiation Program when it comes time to vote on the Initiates for membership into the organization.

Midway Review

A midway review, which is usually held about halfway through the Initiation Program, offers information to an Initiate about their performance during the program so that they can make improvements if/where needed to ensure that they will be inducted. Phi Sigma Pi's National Constitution requires that each Initiate receive feedback on their progress at least once during the Initiation Program, and the midway review, which is often called mid-review, ensures that an Initiate is given an opportunity to improve prior to the final vote.

During the course of the term, it is important that the Initiate Advisor keeps the Chapter up-to-date on the progress of each Initiate in the Initiate Class. Members may have an opportunity to share their feedback regarding Initiates at a midway review Chapter discussion. This feedback could include observations of an Initiate gleaned through interactions at events or in one-on-one meetings. Members should have a standard way of evaluating Initiate performance and may take into consideration any information that the Initiate Advisors share about Initiate attendance, performance on quizzes or progress toward completion of other requirements, like interviews. Utilizing the Characteristics of an Ideal Member is a good way to keep the discussion at midway review focused on the values of the organization.

After gathering information about Initiate performance, the Initiate Advisor should hold individual conversations with each Initiate to provide feedback in a private setting. The goal of this conversation is to acknowledge areas of strength for the Initiate while also addressing any areas that could be improved during the remaining weeks of the Initiation Program. In some cases, the Initiate Advisor may choose to include the Big or other trusted Chapter leaders in these conversations so that the Initiate feels supported in making the necessary changes.

Improve your skills with Leadership in Action Modules:

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



Final Voting

As final vote nears, the Chapter should have a sufficient amount of information about each Initiate's performance throughout the program, as well as whether or not they were able to make improvements since midway review. Any Initiate who does not receive enough votes to be inducted should have been made aware of the areas for improvement, given the opportunity to improve and failed to do so during the final

weeks of the Initiation Program. Adhering to a midway review process ensures that Initiates are able to be successful and protects Chapters against claims of bias or discrimination in the evaluation of Initiates and during the final vote

Regardless of how adept your Chapter is in the use of Robert's Rules of Order, it is a good idea to provide the Chapter a refresher on how debate works prior to the final vote. You can work with the President and Parliamentarian on a presentation to educate Members about the process, what pros and cons will be accepted and any other details that might be helpful, especially for those who have never participated in a final vote before. You should have a standard way of evaluating Initiates, and it is a best practice to ensure that pros and cons are objective and in alignment with the values of the organization. Only issues that have been addressed with an Initiate during the Initiation Program, preferably at mid-review, may be included as part of debate. This ensures that Initiates receive due process and the opportunity to improve.

Prior to beginning the final vote, the Chapter should be reminded that all discussion that occurs during final vote is considered Subrosa. Adhering to Subrosa ensures that the outcome of the vote and all related discussion are not shared with anyone who was not present. The final vote should not be discussed among those who were present once the vote is done.

Also stated in the National Constitution, Article IV, Section 7:

Phi Sigma Pi Members in good standing may nominate qualified individuals to become Collegiate or Honorary Members. Voting shall be by ballot and shall be completed at least forty-eight (48) hours prior to the scheduled Ritual Induction Ceremony at a prior called meeting with quorum and with notice of voting on the meeting agenda. No less than forty-eight (48) hours notice shall be given for this meeting. At least a three-fourths (3/4) vote of the Active Collegiate Members in good standing present and eligible to vote at the meeting with quorum shall be required for confirmation.

When it comes time for the formal vote, the Chapter must do so by ballot. If an Initiate does not have 75% of the membership's affirmative vote, the Initiate is not inducted as a Member of Phi Sigma Pi that term.

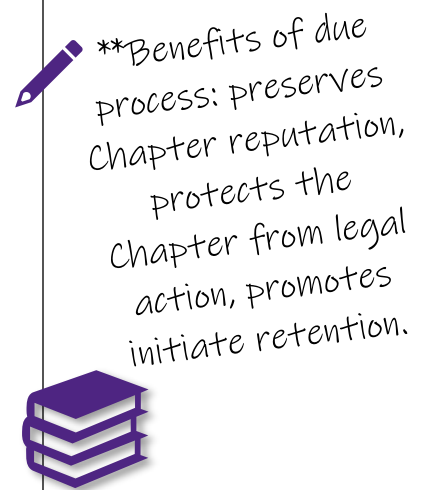
When there is doubt in any particular area concerning the guidelines stipulated by the Chapter (in accordance with national guidelines), all personal prejudices must be removed from the discussion. Judgment should be based upon facts only. And again, the situation must be dealt

with in a timely fashion with no procrastination. Additionally, if an Initiate does not receive the required votes, it should come as little surprise to them as any and all concerns should have been addressed with the Initiate.

If concerns arose after the mid-review it is imperative that the concerns be communicated the Initiate to ensure due process. If concerns arose following mid-review they should be addressed immediately with the Initiate.

This voting procedure should be made known to the Initiates during their first Initiate class meeting so that they are aware that there are performance reviews.

See the Discipline Process, Midway Review and Final Vote resources linked in Additional Resources section in the back of this manual.



THE RITUAL: FORMAL INDUCTION CEREMONY

What is *The Ritual*?

The Initiation Program should conclude with the Formal Induction Ceremony known as *The Ritual*. Like most other fraternal organizations, Phi Sigma Pi has a ritual which is secret and known only to those within its circle of comradeship. However, it must not be so well-guarded that the Members forget its concepts, commitments and expectations. *The Ritual* is the means by which an individual becomes a Member of Phi Sigma Pi; yet, *The Ritual* is much more than just a ceremony for the induction of new Members.

The Ritual is the primary element which distinguishes Phi Sigma Pi from all other organizations. *The Ritual* is based upon commitment and is probably one of the main reasons why Alumni remain loyal and actively participate in the organization for many years after graduation.

The Ritual should be an inspiration, a reminder of a commitment, and a guide to a better way of life for all Phi Sigma Pi Members. *The Ritual* is the principle link that unites all Members of Phi Sigma Pi.

Performing *The Ritual*

It is imperative that the Chapter treat *The Ritual* seriously. Laughing, horseplay and buffoonery detract from the sincerity of the ceremony and should not be tolerated. It is not fair to spoil the experience for the new Member just because the older Members have heard *The Ritual* before. The Chapter should do a professional job, free of mispronunciations and mumbling. Additionally, appropriate altar

supplies (i.e. candles, badge, shield) and an appropriate room will create an atmospheric production.

The Ritual shall only be performed in the presence of Members. Initiates may be present for the purpose of their immediate initiation, of course. Members responsible for the conduct of such ceremony shall ensure that adequate measures are carried out to provide complete privacy and to maintain the secrecy of *The Ritual*.

The Ceremonies and Ritual Book does an excellent job in walking through how to prepare for the ceremony as well as how to have a meaningful discussion with the new Members after the ceremony.

The fraternal grip and word are to be used only by initiated Members of Phi Sigma Pi.

Phi Sigma Pi Initiation Checklist

The following checklist is intended to assist the Chapter President and the Initiate Advisor in preparation of a proper and first-class Chapter Induction Ceremony:

1. The date should be established well in advance to permit each participant the opportunity to know and memorize their part.
2. Advance notice should be given to the Chapter Advisor(s), Chapter alumni, and any National Officers the Chapter might wish to invite.
3. If the initiation and/or the initiation dinner are to be held outside, advance arrangements should be made for reserving a suitable location as well as an indoor location in case of bad weather.
4. All altar cloths should be clean and wrinkle-free and all properties in good working condition.
5. The words for "Brothers Are We" should be distributed to the Chapter Members who will participate in any initiation singing. The song should be practiced regularly, and a special rehearsal should be scheduled if a singing group is to handle this responsibility rather than all Chapter Members.
6. After the Members are assembled in the room, the Chapter President should review special points. The President should ensure that Big Brothers are prepared to remove the initiate pin from the Initiate at the proper time.
7. After the Initiation, all materials and copies of *The Ritual* should be properly safeguarded.
8. The Chapter Secretary ensures that each Initiate signs in the official Chapter roll book.

***Roll books can be ordered through the National Office*

9. The Chapter Secretary and Treasurer should ensure that the Initiates' status is updated in the Chapter Admin Portal (CAP) and Initiate dues and fees are submitted to the National Headquarters by the required due date. This ensures that the National Office has the information needed to create the Shingles and prepare Membership Pins for the new Members.

Conclusion

The Ritual reminds us that purple is a sign of royalty. In the badge, it reminds us that we belong to a select group; the nature of the work makes it necessary to choose only those fit and ready. The purple is emblematic of the heritage which is then the Members responsibility to pass on to succeeding generations.

We have come full circle. *The Ritual* acknowledges that it is the Initiate Advisor's responsibility to pass on the ideas, values, operations, etc. to succeeding generations. So, you must recruit and train new Chapter Members to have a future.

REVIEWING THE PROGRAM'S EFFECTIVENESS

Reviewing and evaluating you Chapter's program is crucial. The easiest and fastest way to quantify is with numbers. Consider the following examples:

Semester/Quarter	Chapter A			Chapter B		
	1	2	3	1	2	3
Initiates admitted to program	20	18	26	20	18	26
Initiates inducted	9	7	14	18	15	24
Percent retention	45%	39%	54%	90%	83%	92%
Percent attrition	55%	61%	46%	10%	17%	8%
Average attrition	54%			12%		
Explanation	1 out of 2 leaves program			1 out of 8 leaves program		

Chapter A has problems. When a Chapter has lost 54 percent of its Initiates by the end of the program, it is a warning sign that something is critically wrong with the program itself. A fairly typical attrition rate is about one in eight, or twelve percent. One hundred percent retention is a theoretical value which does not occur very often in practice. Chapters should expect that some people will drop out or be removed from the program, but it should be the exception rather than the rule. If a Chapter loses greater than twenty percent of its Initiate class, it is time to re-examine the program and contact your National Staff Contact for

ideas. If this happens consistently, then restructuring the program should be the Chapter's first priority.

An Initiation Program Evolves

Let us put things in proper perspective by taking a step backwards. Examining how an Initiation Program evolves in a new, reactivated, or regrouping Chapter can prove beneficial. With each semester/quarter, it will strengthen leading to an increase in Initiate retention. Initiation Programs must hold the Initiates' interest, excite them, and make them feel wanted. With these ingredients, it decreases the desire to withdraw from the program. It goes without saying that if the program is improving its rate of retention, it is also improving the quality of future Members it is creating (i.e. more dedicated, more enthusiastic, more prepared to take on responsibility and leadership roles).

What Do You Change the Next Time Around?

What worked? What did not? How should you change it? Was it too unorganized? Did you get enough out of it? What areas were weak? How can you make the program more effective? The Chapter needs feedback from the new Members to answer these questions effectively. This feedback will strengthen the next Initiation Program by improving the retention rate and quality of the new Members.

By listening to the Initiate class, asking their opinions, requesting suggestions, and having them critique the program after they have been inducted as Members, the Chapter holds the secret to a better Initiation Program and ultimately a better Chapter. These new Members, who have been through an Initiation Program, are the only ones in the Chapter to have had this experience, and thus possess an entirely different perspective on the issue. The Chapter needs this perspective to improve its program the next time around.

By changing certain aspects of the program, and then having the new Members evaluate the program in retrospect, the Chapter improves its program and Membership. For about the first five initiate classes, the program should improve until it levels off at an approximate retention rate of 90+ percent. At this point, the Initiation Program has evolved to the point where the Chapter can feel that its program is working well. A 10 percent attrition rate is the norm for a well-structured, well-developed Initiation Program. In most cases, this loss of 10 percent is not due to a defect in the Chapter's program, but in personal situations and conflicts on the part of individual Potential New Members.

Even a Good Initiation Program Will Fluctuate

Once a Chapter's Initiation Program has reached the point at which it attains good quality Members with a low attrition rate, it is bound to

fluctuate up and down within the 10 percent range from program to program. This fluctuation is due to many variables, including the enthusiasm level of active membership, campus attitudes, and slacking off or gearing up of the program itself. A good Initiation Program is directly related to how high the retention rate is and how effective the Chapter is at creating enthusiastic, committed Members. Remember, it is your future!

Change: The Initiate Advisor's Toughest Job

The toughest job in life is to change. We must recognize the fact that change is unavoidable.

In all our lives there are two kinds of change. There are those changes that we bring upon ourselves and those that are brought upon us by others. While the latter may be the easiest, it is the least desirable form. In bringing change to ourselves, we control our destiny. We control nothing when we wait for outside forces to take that right away.

As Initiate Advisor, you are in a position where you can help your Chapter take control of its future. The pressures that are acting on your Chapter are strong and multi-faceted. This is nothing new. Your Chapter has always, and will always, experience pressures from the university, parents, alumni, and the organization as a whole. Your responsibility as a Members and the Initiate Advisor is to identify those areas in your Chapter's Initiation Program that need to change. Then, your responsibility is to make those changes. If you wait for others to force this change upon the Chapter, that change will cause your Chapter problems.

Hazing is a real problem, whether or not your Chapter believes it is. Each year more state governments and universities have legislated against it. Look deeper. Is scholarship a problem in your Chapter and in its Initiation Program? Do not ignore it; the problem will not go away; it will only get worse. No matter how good a program is, there is always room for change. The world around you has changed over the past year. Has your Initiation Program?

Step One

First, if you recognize that a change is needed, develop an attitude to resolve the problem. No one can change your attitude. Do not go after a problem with a half-hearted attitude. A leader must be able to get psyched before truly inspiring others. If you do not care enough, you will not be able to make the necessary changes. Draw upon your sense of responsibility as a Member of Phi Sigma Pi. It is your most powerful tool.

Step Two

The second step in solving the problem is to take action by opening lines of communication. Once you have sufficiently determined for yourself what is causing the problem, seek out the help of others. Who you go to for help may depend on the problem, but the more people you go to, the more likely you are to solve the problem. Consider seeking advice from your best friend, your Big Brother, a Chapter Officer, a fellow Initiate Advisor, your Chapter Advisor, an Alumnus, a Chapter Excellence Board Advisor, the National Office ... anyone and everyone!

Step Three

Finally, once you have started people talking, begin working from the parts to the whole. Bring some of the individuals you have talked to together as a group. Have this committee form some kind of action plan that can be brought to the Executive Committee. In the end, and only when you are sure that you have the best plan possible, bring it to the Chapter. If you have done your job properly by involving Members in some way from the beginning, they will most likely support you.

Change will be the toughest job of your life if you wish to keep control of it. The true measure of a good leader is not the victories but the efforts. Change requires courage to recognize that a problem exists and to not ignore it in the hope that it will go away. It requires desire to solve that problem with full commitment. It requires willingness to act, to stand up for what is right. It requires determination to persist with effort, to raise quality, and to inspire others to reach for progress. As Kahlil Gibran wrote, "When you have grasped a problem clearly, face it with resolution, for that is the way of the strong."

You can be one of the "strong" in making a strong future for your Chapter, but only if you want to be. Your membership in Phi Sigma Pi and your honorable duty as the Initiate Advisor mark your courage to improve your society. The only way to succeed in managing change successfully is to try, to seek the help of Members, and to persevere. Your success will be measured by your effort.

POLICIES AND PROCEDURES

Keep in mind that the Initiates should be provided access to these documents.

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 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. This includes a communication policy, marketing/branding policy, national award eligibility, etc.

Initiate Bill of Rights

During the Phi Sigma Pi Initiation Program, Initiates have the following rights:

- The right to be treated as an individual.
- The right to be fully informed about the Initiation process. This includes dates, locations and intent of all required Initiation events, quizzes, the Phi Sigma Pi National Membership Exam and Induction in advance.
- The right to ask questions and receive true and objective answers from Members and Staff.
- The right to be treated with respect.
- The right to be treated as a capable and mature person without being patronized.
- The right to have and express opinions to Members and Staff.
- The right to have inviolable confidentiality when sharing information with Members and Staff.
- The right to make informed choices without undue pressure from others.
- The right to make one's own choice and decision and accept full responsibility for the results of that decision.

***National
Constitution
definition of hazing
Article XXI, Section 1*

- The right to have a positive, safe and enriching recruitment and membership experience.
- Phi Sigma Pi is an organization of Members that treats each other with dignity and respect.

There is no place for hazing in the organization and when an incident of hazing is reported, the National organization takes it very seriously. Hazing comes in many forms. Hazing includes any action that causes embarrassment, harassment, or ridicule, or any action that risks emotional or physical harm. If you are aware of hazing being conducted by Members of Phi Sigma Pi to anyone, report it by contacting the National Office at pspoffice@phisigmapi.org or 1-800-366-1916.

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 Membership 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 is the same as the National Risk Management Policy.

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.

Each Chapter Officer and Committee Chair is given access to the CAP based on their position. Check out the [CSE Guide Page 20](#) to read what each position has access to.

***CSE = Chapter Standards of Excellence*

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 three (3) 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 three Alumni or Honorary Member volunteer Advisors who will each have a specific focus area.

- **Communications Advisor:** Branding, Chapter Image, Campus and Community Outreach, Engagement, Communications, Philanthropy
- **Development Advisor:** Chapter Morale, Member Retention, Committees, Programming, Strategy and Evaluation, *The Ritual*
- **Operations Advisor:** Chapter Budget, Fundraising, Governing Documents, Chapter Records, Membership Roster, Due Dates, Officer Transitions, Parliamentary Procedure

Chapter Standards of Excellence (CSE) (<https://phisigmapi.org/cse>) -

An online evaluation resource to empower Chapters to annually meet the highest standards of Chapter governance, management and mission-driven operations. It has been developed to provide transparency for what it means to achieve excellence and be eligible for

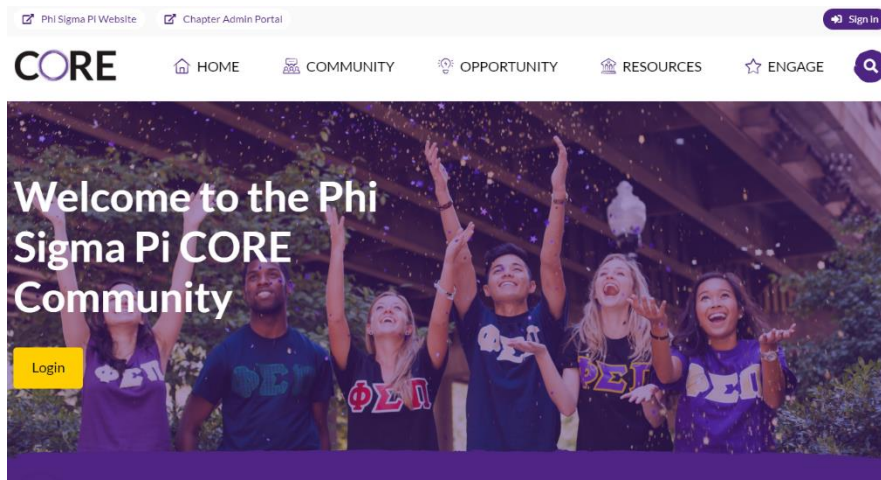
The 8 Guiding Principles



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 eight Guiding Principles encompassing various focus areas and tasks. 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 is designed to provide 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. *Also see Scorecard.*

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. The form provides assistance and guidance with navigating more complex events.

Hugh O'Brian Youth Leadership (HOBY)

(<https://phisigmapi.org/service>) - In 2015, Phi Sigma Pi 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 the 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 the 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 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 the mission.

Initiation Program Curriculum Guide

The Initiate Advisor's "teacher's guide" for the Initiation Program. It provides details for each week including pre/during/post Initiate class meetings. This guide is accompanied with premade .ppt slides to compliment each week's lesson. This can be found in the Resource Center.

Initiation Program
Curriculum Guide



Phi Sigma Pi National Honor Fraternity

Leadership in Action (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>) - The Annual National Convention is the premier event of the year. Members, both Collegiate and Alumni, from across the country converge on the host city for several days of programming. We hold the 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 organization and make decisions that will affect the future as an organization.

In addition to business meeting there is Leadership programming. Members will learn how to be skilled leaders in their Chapters, on their campuses and in their communities. It concludes with the 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.

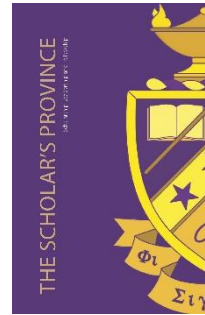


In addition to *The Ritual*, the book contains; The Meeting Commencement Ceremony, Officer Installation Ceremony, Alumni Ritual and The Big Brother Ceremony.

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>).

The Scholar's Province

This is the official guide around which the Initiation Program is built. Initiates should be provided access to *The Scholar's Province* prior to the start of the Initiation Program. The content contained within will be referenced throughout the presentations each week and much of it will appear on the National Exam.



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).

Chapter Standards of Excellence (CSE) > CSE Scorecard Report

Test Chapter for ICE

Group	Component	Indicator
Chapter Development	Participate in an annual Chapter Visit by the National Office	X
	Have one Leadership in Action Facilitator	X
	Host two Leadership in Action Modules	X
	Send a Delegate to National Convention	X
Communication	Have a Chapter Advisor	✓
	Send two published Alumni communications	X
Public Awareness & Engagement	Support HOBY (Our National Philanthropy)	X
	# of hours to plan and execute service events	X
	Maintain active and accurate social media accounts	X

Key
 X Not Complete
 ✓ Complete

You can see both the current year Scorecard (Chapter Standards of

Excellence > CSE Scorecard Reports) and previous Scorecards in the CAP (Reports > CSE Reports > CSE Scorecard History Report).

SURGE (<https://phisigmapi.org/surge>) - Recruitment marketing initiative that supports Chapters with 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. [The Scholar's Province](#)
2. [The Ritual and Ceremonies Book](#)
3. [SURGE](#)
4. [Recruitment 365](#)
5. [Marketing/Style Guide](#)
6. Elevator Pitch
 - a. [Strategic Planning- The Perfect Pitch](#)
7. [Recruitment Resources](#)
8. [Initiation Program Curriculum Guide](#)
9. [Initiate Advisor Resources](#)
 - a. [Midway Review](#)
 - b. [Final Vote](#)
10. [Graduate Students & Your Chapter](#)
11. [Sample Meeting Agenda](#)
12. [Parliamentary Procedure Overview](#)
13. [Risk Management](#)
14. [Diversity, Equity & Inclusion](#)
 - a. [Three Stars](#)
 - b. [Leadership in Action DEI Programs](#)
15. [Due Process](#)
16. SMART Goals
 - a. [Strategic Planning- Turning Strategy Into Action](#)
 - b. [Strategic Planning- The Achievable, Believable Goal](#)
17. Strategic Planning
 - a. [Strategic Planning- The Power Of A Shared Vision](#)
 - b. [Strategic Planning- Strengthening Your Problem-Solving Skills](#)
18. Conflict Resolution
 - a. [Conflict Management- That's Not The Issue](#)
 - b. [Conflict Management- Talk It Out](#)
 - c. [Start The Conversation- The Way To Say It](#)
19. [Characteristics of an Excellent Member](#)
20. [Planning Events](#)
21. [Team Building Activities](#)
22. [Candy Color Ice Breaker](#)
23. [Dice Toss Ice Breaker](#)
24. [Four Corners Ice Breaker](#)
25. [Mission-Aligned Events](#)
26. [National Convention](#)
27. [HOBY](#)
28. [Officer Transition Plan](#)
29. [Officer Training Courses](#)
30. [VIA Character Strengths Assessment](#)

