

PHI SIGMA PI  
NATIONAL HONOR FRATERNITY



# Officer Training Manual: Historian





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## WELCOME

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

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

“As Chapter Historian, you will find history to be an essential part of all civilized social endeavor. You have been selected for keeping a progressive record of all events of your Chapter so that it may have written history. Be sure to capture the wonderful fellowship that occurs in this special Fraternity and preserve the traditions that have evolved with our Chapter.”

## Mission

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

## Our Tripod



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

and into their professional careers.

**Scholarship:** As an honor organization, we expect our Members to maintain good academic standing, although a GPA of 3.0 is only needed to begin the Initiation Program. Academic standing, however, is just a small part of the scholarship ideal. Scholarship in our organization expands outside the classroom and is part of a larger “always learning” philosophy. Our Chapters hold scholarship events and can attend National events that encourage the spirit of lifelong learning.

The nationally award-winning Leadership in Action program is a personal/professional leadership training and certification program that provides Members with the skills to inspire a positive change in all facets of the Fraternity and within their communities. This certification program opportunity goes beyond the traditional organization leadership roles by exploring communication skills for emerging leaders and team management.

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

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

## NATIONAL OFFICE OVERVIEW

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

The Fraternity is a brotherhood with roots in the collegiate experience that engenders a lifelong commitment to strive to achieve true fellowship, leadership and the fulfillment of scholarship as part of Members' overall responsibilities to the broader communities in which they live. Your Chapter is an established and identifiable association of Members perpetuating itself and holding, at the pleasure of Phi Sigma Pi National Honor Fraternity, a duly-issued Charter. The designation "Active Chapter" shall apply and refer to any Chapter duly chartered at, and associated by Charter with, an institution of higher learning. Your Chapter is an unincorporated association that is a separate and distinct entity from Phi Sigma Pi National Honor Fraternity.

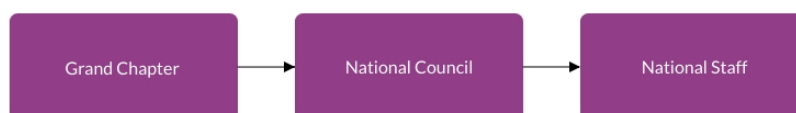
With that, the National Office is designed to support your chartered Chapter to uphold our mission and purpose. To do that the National Office provides the foundational structure.

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

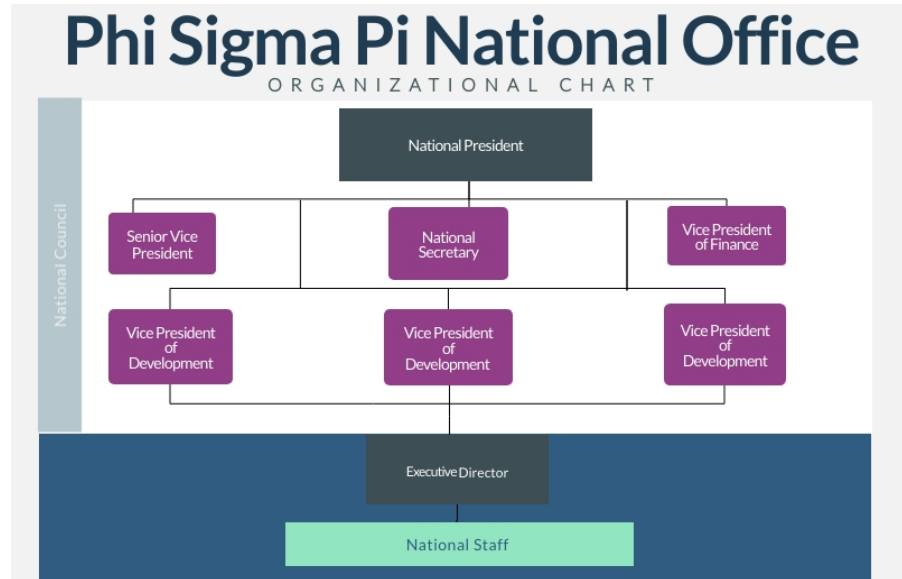
Official business is held once a year during Grand Chapter Business at National Convention. This is the time when amendments to our National Constitution are voted on and elections are held for National Council positions (every other year). It is important to note that changes to the National Constitution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

Phi Sigma Pi

## Governance



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



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

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

### Contact the National Office

The National Office is here for you!

Phone: 717-299-4710

Email: [pspoffice@phisigmapi.org](mailto:pspoffice@phisigmapi.org)

Web: <https://phisigmapi.org>

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

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

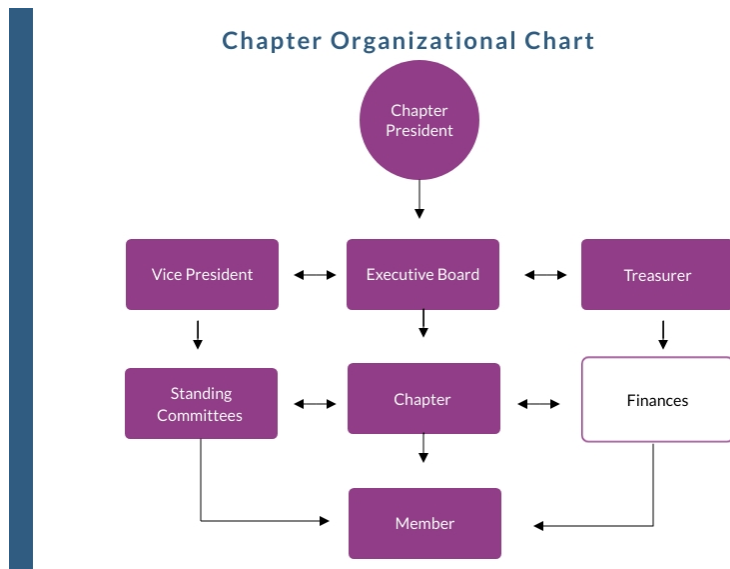
Twitter: <https://twitter.com/phisigmapi>

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



## CHAPTER ORGANIZATIONAL CHART

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



## TIPS FOR BECOMING A SUCCESSFUL CHAPTER HISTORIAN

### Understanding Your Leadership Strengths

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

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

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



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

Improve your skills with Leadership in Action Modules:

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

## How to Motivate and Involve People

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

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

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



Improve your skills with Leadership in Action Modules:

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

## Striking a Balance Between Scholarship, Leadership and Fellowship

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

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

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

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

## Communication is the Key

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

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

Improve your skills with Leadership in Action Modules:

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



## Delegate Tasks to People Who Want to Do Them

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

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

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

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

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



Improve your skills with Leadership in Action Modules:

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

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



Improve your skills with Leadership in Action Modules:

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

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

Improve your skills with Leadership in Action Modules:

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

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

Improve your skills with Leadership in Action Modules:

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

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

Improve your skills with Leadership in Action Modules:

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

## Officers Must Be Organized and Enthusiastic

Chapter Members are energized and dedicated by seeing leaders enthusiastic and committed. 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](#)



## KEY RESPONSIBILITIES

The Chapter Historian is entrusted with the very special task of maintaining the Chapter's history. You are directly responsible for recording all important Chapter events of the academic year and safeguarding the Chapter's archives and historical documents to ensure proper handling and preservation. The Historian's responsibilities are vital to the Fraternity. Not only does preserved history keep Members updated and Alumni informed, but perhaps more importantly, it is the only record the Fraternity has for future Members. It is your Chapter's "story" and is essential to the preservation of Phi Sigma Pi.

### Specific Responsibilities

**1. Know the Chapter's history and strive to promote the importance of this awareness in the Chapter.**

Every Member in Phi Sigma Pi should have a basic understanding of national and chapter history. This common heritage is the thread that binds all Members and Chapters together. As Chapter Historian, you should ensure that the Initiation Program includes learning the Chapter's history along with the National Fraternity's history.

**2. Keep accurate and complete records of all chapter activities.**

As Historian, you should attend as many of your Chapter's activities as possible and record them by taking photographs and summarizing all of the events for future use. If you are unable to attend an event, appoint someone in your Chapter the responsibility of taking pictures and writing a summary of the event.

**3. Create a scrapbook of pictures, newspaper clippings, and other interesting chapter items.**

A scrapbook is a great asset to your Chapter. It should contain details of the Chapter's founding, progress, trials, and achievements. Creating a scrapbook is also a great way to introduce your Chapter to prospective members during recruitment.

Since the scrapbook is a record of your Chapter's achievements, it also provides an excellent source of feature material for Chapter publications and *The Purple & Gold*, Phi Sigma Pi's official magazine. Each edition of *The Purple & Gold* contains content that is valuable for both Collegiate and Alumni Members, families, Chapter Advisors and friends. The magazines are

mailed to all Collegiate Members and National Alumni Association Members.

When starting a scrapbook, choose a book with large, loose leaves that enables you to attach photographs, clippings, etc. These books can be purchased at craft or office supply stores.

**4. Prepare a presentation for potential new members.**

A presentation is also a very good visual tool to promote Phi Sigma Pi at your Chapter's "meet nights." Chapters are encouraged to create a presentation that shows off a variety of Chapter activities. As you prepare the presentation, choose images that promote the Fraternity's ideals of scholarship, leadership, and fellowship.

**5. Update the Chapter history and assist with the Tripod Event Forms for the National Office.**

Additionally, the National Headquarters encourages Chapter Historians to send any informative materials such as photographs, programs from special events, and articles written about your Chapter in your campus newspaper. The National Office welcomes this kind of Chapter information and oftentimes includes these items in the Purple & Gold, national presentations, national brochure, social media, etc.

Finally, if your Chapter has any valuable historical items (the Chapter's first roll book, old minutes from early meetings, etc.) and does not have the means to preserve them, you may wish to send them to the National Office for safekeeping.

**6. Train and assist your successor in office.**

Officer training is vital to the continued success of your Chapter. You should make time to train the newly-elected Historian so that the transition is a smooth one. Explain the duties of the office and provide helpful hints to the new officer. Allow the new officer to ask questions and assist in preparing the Tripod Event Form.

**7. Miscellaneous.**

Along with the duties listed above, Chapter Historians often take on the responsibility of organizing their Chapter composite.

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

## HISTORIAN CHECKLIST

### What's Due When Administratively

As Historian, your due dates center around the Tripod Event Form(s). These are submitted by each Committee Chair (overseen by the Vice President). This form allows the Committee Chairs to share their planned event details. In addition to updating the Chapter's Standards of Excellence Scorecard (*See Chapter Standards of Excellence and Score Card below*) the submission also serves as a great Committee Chair transition training as the submitted reports are stored in the [Chapter Admin Portal](#) (CAP). As Historian, you are able to provide the pictures and other perspective of the event for submissions.

### Semester Schools

#### Fall Semester

##### **Dec. 15:**

- [Tripod Event Form](#) (minimum of 3)

#### Spring Semester

##### **May 15:**

- [Tripod Event Form](#) (minimum of 3)

### Quarter Schools

#### Fall Quarter

##### **Dec. 15:**

- [Tripod Event Form](#) (minimum of 2)

#### Winter Quarter

##### **March 1:**

- [Tripod Event Form](#) (minimum of 2)

#### Spring Quarter

##### **June 15:**

- [Tripod Event Form](#) (minimum of 2)

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



## POLICIES AND PROCEDURES

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

### National Constitution

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

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

### National Risk Management Policy

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

### National Operating Policies

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

### Amnesty Program

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

## Chapter Bylaws

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

## Chapter Operating Policies

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

## Chapter Risk Management Policy

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



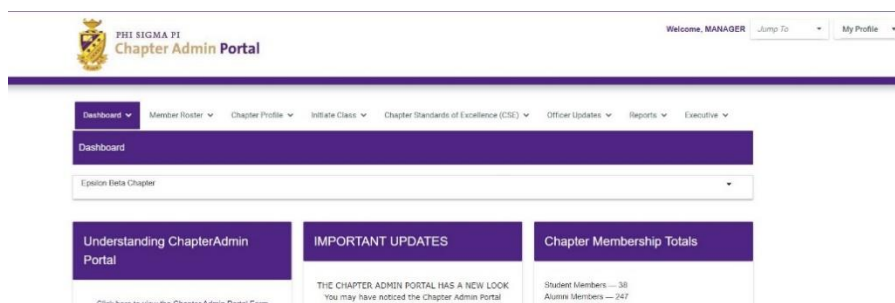
*\*\*This means there are additional materials for you!*

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 Manual Page 26](#) to read what each position has access to.



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

The objectives of the Chapter Excellence Board are to:

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

Each Chapter Excellence Board will work with approximately ten Collegiate Chapters. The Chapter Excellence Board will be composed of

*\*\*CSE = Chapter Standards of Excellence*

four Alumni or Honorary Member volunteer Advisors who will each have a specific focus area.

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

### Chapter Standards of Excellence (CSE)

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

#### The 8 Guiding Principles



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

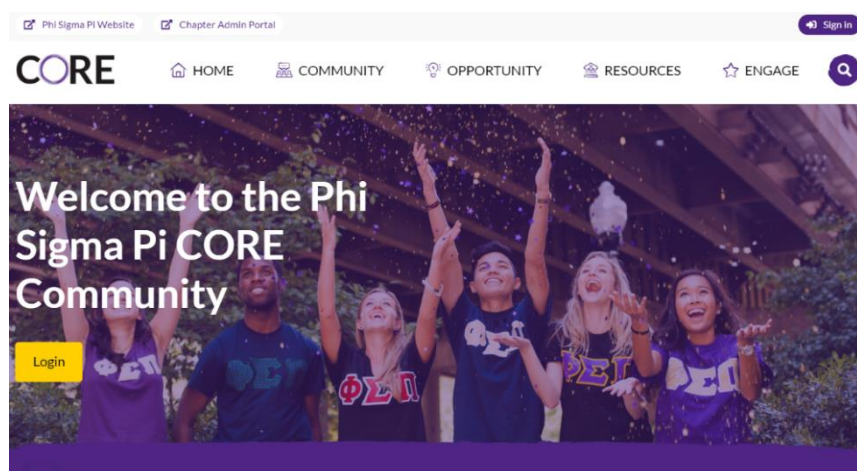
The Chapter Standards of Excellence consists of 8 Guiding Principles covering over 40 focus areas and benchmarks.

Together these outline best practices and governing requirements of a Chapter's operations, training, Member development and two structured implementation programs: the Tripod Event and Recruitment. This program provides the basic concepts of leading a non-profit organization, for that is exactly what each Chapter is - a non-profit entity with the mission to improve humanity with honor through Scholarship, Leadership and Fellowship. *Also see Scorecard.*

**Chapter Visit** - The official meeting between your Chapter and a National Staff member. While there is often a sense that the National Office is coming to critique a Chapter, the main goal is to support the Chapter with direct interaction and address challenges the Chapter may

be having, provide requested training/development and/or celebrate the Chapter's successes. Visits occur once a year, in person or virtually.

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



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

### **Hugh O'Brian Youth Leadership (HOBY)**

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



O'Brian Youth Leadership. Ever since we have been fostering a relationship of volunteerism, service and support that has benefited both of our organizations in big ways. HOBY's mission is to inspire young people to

make a difference and become catalysts for positive change in their home, school, workplace and community.

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

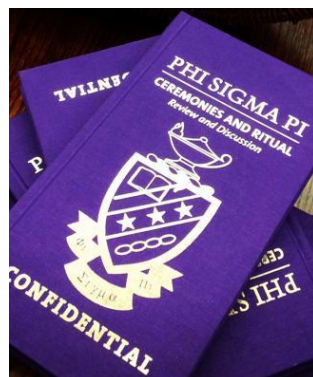


award-winning certification program that consists of interactive Modules for Members. The Modules are flexible courses based on leadership skills and soft skills that can be applied immediately to the participant's daily life. Modules tackle a variety of topics that can take your leadership skills to

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

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

After the business meeting is complete, we move onto Leadership programming. Members will learn how to be skilled leaders in their Chapters, on their campuses and in their communities. It concludes with our annual Banquet and Awards Presentation. This event is the biggest of the year.

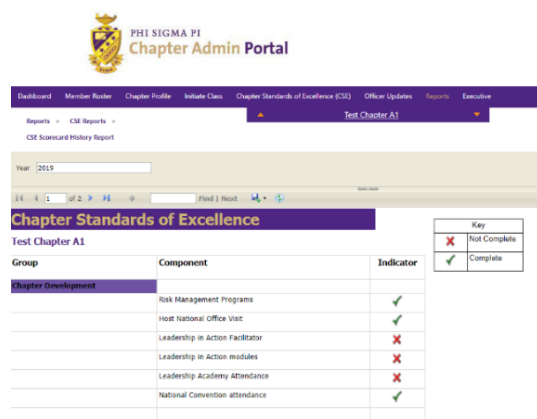


**The Ritual** - Also known as the Formal Induction Ceremony. It is the culmination of an Initiate's work and the celebration and official recognition as a Member. It is intended to be a memorable and distinguished occasion and is the one ceremony that binds all Phi Sigma Pi Members together.

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

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

**Scorecard** - a visual Chapter Standards of Excellence report card that



acknowledges the Chapter's achievements. As the Chapter accomplishes the various tasks in CAP throughout the academic year, a Scorecard captures whether a particular focus area has been completed (with a green checkmark) or still needs to be completed (red X).

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

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

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

**Tripod Event Form**

Academic Year: 2019-2020

\* Academic Term:

\* Should this event be considered for a national award?:

\* Title of the Event:

\* What is the Event Type?:

If it was a Philanthropy event; what is the name of the local Philanthropic Partner?:

\* What was the Purpose of the Event?:

\* What was the secondary purpose of the event?:

Please upload an image from the Event:  No file chosen

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

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

\* Scholarship:

\* Leadership:

\* Fellowship:

\* Was this a Chapter Event or a Public (campus-wide) Event?:

\* What was it? (Please provide a detailed event description including scope and summary of activities) - 2000 character limit:

Location of Event:

\* Date of Event:

\* Has the event been held before?:

If yes, has the event grown from the previous event?:

What external resources were utilized in the planning and completion of this event? These resources may include access to an expert, using university resources or partnering with a community organization.:

\* Did you implement Risk Management steps?:

# of hours to plan and execute event (rounding is acceptable):

On a Scale of 1-5, how would you rate the overall success, with 5 being very successful?:

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**SOCIAL CHANGE**

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

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**FINANCING**

Was it a fundraising event?:

If yes, how much was raised?:

If yes, which organization was the fundraising event benefitting?:

What were the budgeted and actual expenses?:  No file chosen

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**PARTICIPATION**

Who was invited? Check all that apply:

Collegiate members invited:

Students invited:

Alumni invited:

Admin invited:

Community invited:

# of attending Collegiate Members:

# of attending Alumni Members:

# of attending Guests:

# of Volunteers:

\* Were other campus groups involved?:

If yes, who?:

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**PROMOTION**

How was the event advertised? (Print Ad, Social Media, Flyer, etc.):

\* Was there media exposure for the event? (local TV, newspaper, etc.):

If yes, please share links:

---

**EVALUATION**

\* Who evaluated the event?:

---

**CONCLUSION**

Will the event be held in the future?:

Key Recommendations for future event?:

Other comments:

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(Selection) Step: Enter Information  (Validation)





## ADDITIONAL RESOURCES

1. [Marketing/Style Guide](#)
2. [The Scholar's Province](#)
3. [The Ritual and Ceremonies Book](#)
4. [Risk Management](#)
5. [National Convention](#)
6. [HOBY](#)
7. [Officer Transition Plan](#)
8. [Officer Training Courses](#)
9. [VIA Character Strengths Assessment](#)