President

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
Chapter President Meets with the Greek Advisor Monthly	Chapter Management	Basic	President Meeting with Greek Advisor	President	Chapter Advisor	N/A	N/A	5/1	N/A
President Check in with District Archon Once per Academic Term	Chapter Management	Basic	President Check in with District Archon	President	District Archon	N/A	N/A	12/31	5/1
Host an Officer Transition Workshop	Chapter Management	Basic	Officer Transition Workshop Form	President	Director of Chapter Services & Standards	N/A	N/A	12/31	N/A

Treasurer

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
Submit Annual Budget to National Fraternity	Financial Management	Minimum	2019-2020 Annual Budget Submission	Treasurer	Finance Advisor	Director of Chapter Services & Standards	N/A	9/30	N/A
Form 990 Tax Document Submitted to the IRS and to the National Fraternity	Financial Management	Minimum	990 Tax Document Submission Form	Treasurer	Director of Chapter Services & Standards	N/A	N/A	9/30	N/A
No Bills Over 90 Days Past Due with the National Fraternity	Financial Management	Basic	No Form; Information Collected through OmegaFi	Treasurer	N/A	N/A	N/A	N/A	N/A

Corresponding Secretary

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
Take At Least One New Member Class per Year and Conduct Initiation of New Member Class	Membership Recruitment	Minimum	No Form; Information Collected through Phi Psi Portal	Corresponding Secretary	N/A	N/A	N/A	5/1	N/A
All seven (7) Standing Committees Established	Chapter Management	Basic	No Form; Information Collected through Phi Psi Portal	Corresponding Secretary	N/A	N/A	N/A	9/30	2/28
Chapter Operations Documents Submitted	Chapter Management	Minimum	Chapter Operations Documents	Corresponding Secretary	Chapter Advisor	N/A	N/A	9/30	2/28
Calendar Year Presidency	Chapter Management	Basic	Calendar Year Presidency Verification Form	Corresponding Secretary	Chapter Advisor	N/A	N/A	9/30	2/28
Chapter Advisor, Faculty Advisor, and One Additional Advisor Updated in Phi Psi Portal	Alumni Relations	Basic	No Form; Information Collected through Phi Psi Portal	Corresponding Secretary	N/A	N/A	N/A	9/30	N/A
Have at Least Two (2) Active Social Media Accounts	Campus and Community Involvement	Basic	Social Media Account Information	Corresponding Secretary	Digital Marketing Manager	N/A	N/A	9/30	2/28
Secondary Committees are Established on Phi Psi Portal	Chapter Management	Advanced	No Form; Information Collected through Phi Psi Portal	Corresponding Secretary	N/A	N/A	N/A	9/30	2/28
Chapter Advisor, Faculty Advisor, and Two Additional Advisors Updated in Phi Psi Portal	Alumni Relations	Advanced	No Form; Information Collected through Phi Psi Portal	Corresponding Secretary	N/A	N/A	N/A	9/30	N/A
Chapter Advisor, Faculty Advisor, and Three Additional Advisors Updated in Phi Psi Portal	Alumni Relations	Premier	No Form; Information Collected through Phi Psi Portal	Corresponding Secretary	N/A	N/A	N/A	9/30	N/A

5395 Emerson Way, Indianapolis, IN 46226   317.632.1852   www.phikappapsi.com

Chaplain

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
One Alumnus Present at Initiation to Give Alumni Address	Alumni Relations	Basic	Initiation Alumni Attendance	Chaplain	President	N/A	N/A	5/1	N/A
Ritual Review Completed for Chapter with 80% Membership Attendance	Fraternity Education	Basic	Ritual Review Form	Chaplain	N/A	N/A	N/A	5/1	N/A

Alumni Relations Chairman

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
Host At Least One Alumni Event per Term (Two per Year)	Alumni Relations	Basic	Alumni Event Form	Alumni Relations Chairman	N/A	N/A	N/A	12/31	5/1
Participate/Host Phi Kappa Psi Founders' Day Event	Alumni Relations	Basic	Founders' Day Form	Alumni Relations Chairman	N/A	N/A	N/A	5/1	N/A
Send an Alumni Newsletter Twice Per Year	Alumni Relations	Basic	Alumni Newsletter Distribution	Alumni Relations Chairman	Chapter Advisor	N/A	N/A	12/31	5/1
Host at Least Three Alumni Events per Year	Alumni Relations	Advanced	Alumni Event Form	Alumni Relations Chairman	N/A	N/A	N/A	5/1	N/A
Conduct Alumni Induction Ceremony for Graduating Seniors	Alumni Relations	Advanced	Alumni Induction Ceremony	Alumni Relations Chairman	Chapter Advisor	Director of Chapter Services & Standards	N/A	5/1	N/A
Create and Implement a Mentoring Program between Members and Alumni	Alumni Relations	Advanced	Alumni Mentoring Form	Alumni Relations Chairman	N/A	N/A	N/A	10/31	N/A

5395 Emerson Way, Indianapolis, IN 46226   317.632.1852   www.phikappapsi.com

Membership Recruitment Chairman

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
Distribute a Recruitment Scholarship to Potential Members	Membership Recruitment	Advanced	Recruitment Scholarship Form	Membership Recruitment Chairman	N/A	N/A	N/A	5/1	N/A

Fraternity Education Chairman

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
One Continuing Education Program per Term with 85% Attendance from Chapter Members	Fraternity Education	Basic	Continuing Education Program Form	Fraternity Education Chairman	Director of Chapter Services & Standards	N/A	N/A	12/31	5/1
Adherence to National New Member Program and Initiation Deadlines	Fraternity Education	Minimum	No Form; Information Collected through Phi Psi Portal	Fraternity Education Chairman	N/A	N/A	N/A	Program Length (10-day, 21-day, 6-week program)	Program Length (10-day, 21-day, 6-week program)

Philanthropy Chairman

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
Raise an Average of $25 Philanthropic Dollars per Man per Year	Campus and Community Involvement	Basic	Philanthropy Event Form	Philanthropy Chairman	N/A	N/A	N/A	5/1	N/A
Raise an Average of $50 Philanthropic Dollars per Man per Year	Campus and Community Involvement	Advanced	Philanthropy Event Form	Philanthropy Chairman	N/A	N/A	N/A	5/1	N/A
Raise an Average of $100 Philanthropic Dollars per Man per Year	Campus and Community Involvement	Premier	Philanthropy Event Form	Philanthropy Chairman	N/A	N/A	N/A	5/1	N/A

Community Service Chairman

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
20 Community Service Hours per Man per Year	Campus and Community Involvement	Basic	Chapter Community Service Hours Tracking Form	Community Service Chairman	Vice President	Director of Chapter Services & Standards	N/A	5/1	N/A
Partner with a Campus OR Community Organization to Co-host a Philanthropy, Service, or Educational Event At Least Once per Year	Campus and Community Involvement	Basic	Co-Hosted Event Form	Community Service Chairman	N/A	N/A	N/A	5/1	N/A
Maintain an Approved Partnership with an Organization Devoted to Addressing Poverty Issues in their Community	Campus and Community Involvement	Basic	Organizational Partnership Reporting Form	Community Service Chairman	Senior Director of Member Development	N/A	N/A	12/31	N/A
25 Community Service Hours per Man per Year	Campus and Community Involvement	Advanced	Chapter Community Service Hours Tracking Form	Community Service Chairman	Vice President	Director of Chapter Services & Standards	N/A	5/1	N/A
70% of members involved in at least one organization other than Phi Kappa Psi	Campus and Community Involvement	Basic	Chapter Individual Member Involvement Tracking Form	Community Service Chairman	N/A	N/A	N/A	5/1	N/A
Participate in the Phi Kappa Psi National Week of Service	Campus and Community Involvement	Basic	National Week of Service Event Form	Community Service Chairman	N/A	N/A	N/A	5/1	N/A
30 Community Service Hours per Man per Year	Campus and Community Involvement	Premier	Chapter Community Service Hours Tracking Form	Community Service Chairman	Vice President	Director of Chapter Services & Standards	N/A	5/1	N/A
75% of members involved in at least one organization other than Phi Kappa Psi	Campus and Community Involvement	Advanced	Chapter Individual Member Involvement Tracking Form	Community Service Chairman	N/A	N/A	N/A	5/1	N/A
Partner with a Campus OR Community Organization to Co-host a Philanthropy, Service, or Educational Event At Least Twice per Year	Campus and Community Involvement	Advanced	Co-Hosted Event Form	Community Service Chairman	N/A	N/A	N/A	5/1	N/A
Host One Chapter Wide Community Service Event with At Least 80% Attendance of Members	Campus and Community Involvement	Advanced	Community Service Event Form	Community Service Chairman	N/A	N/A	N/A	5/1	N/A
80% of members involved in at least one organization other than Phi Kappa Psi	Campus and Community Involvement	Premier	Chapter Individual Member Involvement Tracking Form	Community Service Chairman	N/A	N/A	N/A	5/1	N/A

5395 Emerson Way, Indianapolis, IN 46226   317.632.1852   www.phikappapsi.com

Risk Management Chairman

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
Fall Risk Management Education Program Completed with 85% Attendance	Chapter Management	Minimum	Risk Management Education Program Form - Alcohol & Drug Abuse	Risk Management Chairman	President	Chapter Advisor	Director of Chapter Services & Standards	12/31	N/A
Spring Risk Management Education Program Completed with 85% Attendance	Chapter Management	Minimum	Risk Management Education Program Form - [Insert Topic]	Risk Management Chairman	President	Chapter Advisor	Director of Chapter Services & Standards	5/1	N/A
Safe Social Events Plan Created and Submitted	Chapter Management	Minimum	Safe Social Events Plan	Risk Management Chairman	President	Chapter Advisor	Director of Chapter Services & Standards	9/30	N/A
At Least Four (4) Risk Management Education Programs Completed with 85% Attendance	Chapter Management	Advanced	Risk Management Education Program Form - [Insert Topic]	Risk Management Chairman	President	Chapter Advisor	Director of Chapter Services & Standards	5/1	N/A
All Six (6) Risk Management Education Programs Completed with 85% Attendance	Chapter Management	Premier	Risk Management Education Program Form - [Insert Topic]	Risk Management Chairman	President	Chapter Advisor	Director of Chapter Services & Standards	5/1	N/A

Scholarship Chairman

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
Minimum GPA Established for All Members	Academics	Minimum	Member GPA Verification	Scholarship Chairman	Vice President	N/A	N/A	9/30	N/A
Minimum GPA Established for Recruitment of New Members	Academics	Minimum	Recruitment GPA Verification	Scholarship Chairman	Vice President	N/A	N/A	9/30	N/A
Academic Support Plan	Academics	Minimum	Academic Support Plan	Scholarship Chairman	Vice President	N/A	N/A	9/30	N/A
Officer Minimum GPA is Above the Active Minimum GPA	Academics	Advanced	Officer GPA Verification	Scholarship Chairman	Vice President	N/A	N/A	9/30	N/A

5395 Emerson Way, Indianapolis, IN 46226   317.632.1852   www.phikappapsi.com

Greek Advisor

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
Chapter GPA at or Above the All Male Average or 2.75, Whichever is Higher	Academics	Basic	GPA / Membership Reporting Link	Greek Advisor	N/A	N/A	N/A	12/31	5/1
Membership Size at or Above the All IFC Average OR At Least 25 Members	Membership Recruitment	Basic	GPA / Membership Reporting Link	Greek Advisor	N/A	N/A	N/A	12/31	5/1
Membership Size Within Top Half of IFC Chapters	Membership Recruitment	Basic	GPA / Membership Reporting Link	Greek Advisor	N/A	N/A	N/A	12/31	5/1
Chapter GPA Within Top Third of IFC Chapters	Academics	Advanced	GPA / Membership Reporting Link	Greek Advisor	N/A	N/A	N/A	12/31	5/1
Membership Size Within Top 33%of IFC Chapters	Membership Recruitment	Advanced	GPA / Membership Reporting Link	Greek Advisor	N/A	N/A	N/A	12/31	5/1
Chapter GPA Within Top 25% of IFC Chapters	Academics	Premier	GPA / Membership Reporting Link	Greek Advisor	N/A	N/A	N/A	12/31	5/1
Membership Size Within Top 25% of IFC Chapters	Membership Recruitment	Premier	GPA / Membership Reporting Link	Greek Advisor	N/A	N/A	N/A	12/31	5/1

5395 Emerson Way, Indianapolis, IN 46226   317.632.1852   www.phikappapsi.com

No Form Submission Required

Standard	Operational Area	Operational Performance	Form Title	Submitted by	First Approval	Second Approval	Third Approval	Due Date 1	Due Date 2
No Risk Management Violations	Chapter Management	Minimum	No Form	N/A	N/A	N/A	N/A	N/A	N/A
Attendance at Mandatory National Events	Chapter Management	Basic	No Form	N/A	N/A	N/A	N/A	5/1	N/A
Minimum Member Retention Rate of 80% for All New Member Classes	Membership Recruitment	Basic	No Form; Information Collected through Phi Psi Portal	N/A	N/A	N/A	N/A	5/1	N/A
100% of New Members Complete GreekLifeEDU (at least part 1)	Fraternity Education	Minimum	No Form	N/A	N/A	N/A	N/A	6/1	N/A
Member(s) of the Chapter Participate in the Fraternity's Professional Development Conference or Service Immersion Trips	Fraternity Education	Advanced	No Form	N/A	N/A	N/A	N/A	5/1	N/A

5395 Emerson Way, Indianapolis, IN 46226   317.632.1852   www.phikappapsi.com