

PHI KAPPA PSI **Monthly Chapter Operations Call**

January 12th, 2022

PHI KAPPA PSI FRATERNITY

Meeting Agenda – 01/12/2022

- Spring Billing & Roster Updates
- Insurance – Additionally Insured
- ASCEND – Officer Trainings
- In-Person Programming
- Chapter Advisor Training
- Founders' Day 2022
- Minimum Standards Requirements
- Risk Management Education



PHI KAPPA PSI FRATERNITY

Spring 2022 Billing & Rosters

PHI KAPPA PSI 2021-22 MEMBERSHIP COSTS



General Fraternity Fees | Active Member

Fall/Spring Dues \$153 per period	+	Liability Insurance \$120* per period <small>*Estimate</small>	+	Canonsburg Assessment \$10 per period for chapters not exempted	=	\$283 Due Fall Term	↓	\$283 Due Spring Term	→	Total Annual Fees \$566
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General Fraternity Fees | New Member (Spring)

New Member Fee \$50 One-time fee charged at time of joining.	+	Initiation Fee \$250 One-time fee charged when initiated.	+	First Term Dues \$100* <small>*Only billed to new members reported February 8 - May 23, 2022</small>	=	\$0 Due Fall Term	↓	\$400 Due Spring Term	→	Total New Member Fees \$400
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Rosters must be updated by February 7th!

PHI KAPPA PSI FRATERNITY

Insurance & Additionally Insured

- Coverage: 10/01/2021 – 10/01/2022
- Certificate Holder(s)
 - All recognized alumni groups, undergraduate chapters, and colonies
- Certificate of Liability Insurance can be found on HQ Docs
- Please contact HQ if your University requests **additional coverage**

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY)	
				09/24/2021	
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.					
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).					
PRODUCER Solene Murphy 13810 PBS Parkway Omaha NE 68154		CONTACT NAME: Edward Kirkin PHONE: [] FAX: [] E-MAIL: [] ADDRESS: []			
INSURED Phi Kappa Psi Fraternity 5395 Emerson Way Indianapolis IN 46226		INSURER(S) AFFORDING COVERAGE INSURER A: Landmark American Insurance Co INSURER B: [] INSURER C: [] INSURER D: [] INSURER E: [] INSURER F: []			
COVERAGES		CERTIFICATE NUMBER: cert ID 1473		REVISION NUMBER: []	
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.					
TYPE	TYPE OF INSURANCE	ADD. BUREAU	POLICY NUMBER	POLICY EFF. DATE	POLICY EXPI. DATE
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> ISO <input checked="" type="checkbox"/> LOC <input type="checkbox"/> OTHER	INDL (IND)	LEIA112637	10/01/2021	10/01/2022
					EACH OCCURRENCE \$ 250,000 DAMAGE TO RENTED PREMISES (EA occurrence) \$ 250,000 MED EXP (Any one person) EXCLUDED PERSONAL & ADV INJURY \$ 250,000 GENERAL AGGREGATE \$ 500,000 PRODUCTS - COMPOP AGG \$ 250,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> OTHER	INDL (IND)	LEIA112637	10/01/2021	10/01/2022
					COMBINED SINGLE LIMIT \$ 250,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ EACH OCCURRENCE \$ AGGREGATE \$ DED. \$ RETENTION \$
	WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER/STUDENT (Mandatory in IN) If a description under DESCRIPTION OF OPERATIONS below	Y/N	N/A		
					PER STATUTE <input type="checkbox"/> OTHER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Includes a \$200,000 per occ/agg SIR excess of \$2,500 per occurrence maintenance SIR. Certificate Holder is an insured under these policies.					
CERTIFICATE HOLDER		CANCELLATION			
All Recognized Alumni Groups, Undergraduate Chapters and Colonies of Phi Kappa Psi Fraternity		SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.			
		AUTHORIZED REPRESENTATIVE [Signature]			

ACORD 25 (2016/03)

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ASCEND – Officer Trainings

- ASCEND is Phi Psi's new online educational program for officers and committee chairs to learn a variety of skills necessary to foster success within their position and for their respective chapter.
- The program is built for several roles initially including:
 - President
 - Vice President
 - Corresponding Secretary
 - Treasurer
 - Risk Management Chairman
 - Fraternity Education Chairman
 - Recruitment Chairman
- ASCEND will be released during the next Chapter Operations call on February 9th, 2022.

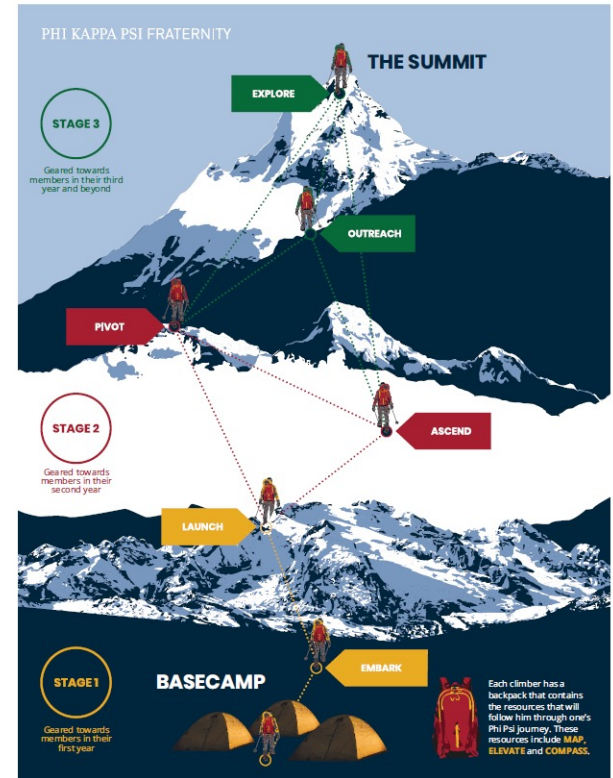


Phi Psi Training

PHI KAPPA PSI FRATERNITY

In-Person Programming Returning Spring 2022

- **In-Person Programming is Back!**
- **Returning in Spring 2022 are:**
 - **OUTREACH**
 - **LAUNCH**



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Chapter Advisor Training

- Join the Alumni Engagement and Chapter Operations staff on **January 25th at 8:00 pm ET** to hear updates and reminders for your role and chapter. We will end the session with open dialogue where you can ask questions of your peers and can share successes, asked for advice and understand the challenges other advisory teams have.
- Register here: <https://phikappapsi.us7.list-manage.com/track/click?u=1d9ca02892f1b95d2e451c8a4&id=9d11c02029&e=8de5478a87>



Phi Psi Training

PHI KAPPA PSI FRATERNITY

Founders' Day 2022

- Please submit your Founders' Day event information to alumni@phikappapsi.com
- Current event information can be found at: <https://www.phikappapsi.com/founders-day-events/>
- This year's theme is:
"I enjoyed it then, I enjoy it now."



170 years of excellence!

PHI KAPPA PSI FRATERNITY

Minimum Standards of Accreditation

Chapter Achievement	Liability Insurance Premium Change
Does not meet Minimum Chapter Operational Standards	+10%
Meets Minimum Chapter Operational Standards	Base Rate

Minimum Chapter Operational Standards

1. Take at least one new member class per year and conduct initiation of new member class.
2. Adherence to national new member program and initiation deadlines.
3. 100% of new members complete GreekLifeEDU (at least part 1) before June 1st.
4. Minimum GPA established for all members and minimum GPA established for recruitment of new members.
5. Completion of Fall and Spring Risk Management Education Program with 85% attendance (Fall Topic *must* cover Alcohol and Drug Abuse).
6. Safe Social Event Plan submitted to the National Fraternity.
7. Annual budget submitted to the National Fraternity.
8. Form 990 tax document submitted to the IRS and the National Fraternity
9. Chapter Operations Documents submitted to the National Fraternity
10. Officer Risk Management Signature Form
11. Fall and Spring Chapter Information Audit

PHI KAPPA PSI FRATERNITY

Minimum Standards of Accreditation

Standard	Form Title	Submitted By	Due Date 1	Due Date 2
Take at least one new member class and conduct initiation of new member class	<i>N/A</i> <i>Chapter reports membership via Phi Psi Portal</i>	<i>N/A</i>	05/01/22	<i>N/A</i>
Adherence to National new member program and initiation deadlines	<i>N/A</i> <i>Chapter reports membership via Phi Psi Portal</i>	<i>N/A</i>	05/01/22	<i>N/A</i>
100% of new members complete GreekLifeEdu (at least part 1) before June 1 st , 2022	<i>N/A</i> <i>Progress tracked via GreekLifeEdu</i>	<i>N/A</i>	06/01/22	<i>N/A</i>
Minimum GPA requirements established for all members and recruitment of new members	Chapter GPA Requirements	Scholarship Chairman	12/31/21	<i>N/A</i>
Completion of Fall & Spring Risk Management Education Programs with 85% attendance (Fall topic <i>must</i> be Alcohol & Drug Abuse)	Risk Management Programs	Risk Management Chairman	12/31/21	05/01/22
Safe Social Events Plan submitted to National Fraternity	Safe Social Events Plan	Risk Management Chairman	12/31/21	<i>N/A</i>
Annual Budget submitted to National Fraternity	Annual Budget	Treasurer (P)	12/31/21	<i>N/A</i>
Form 990 Tax Document submitted to IRS and National Fraternity	Form 990 Tax Document	Treasurer (P)	05/01/22	<i>N/A</i>
Chapter Operations Documents submitted to National Fraternity	Chapter Operations Documents	Corresponding Secretary (AG)	12/31/21	<i>N/A</i>
Risk Management Policy Officer Agreements	Officer Risk Management Signature Form	GP; VGP; Treasurer; Recruitment Chairman; Social Chairman; Fraternity Education Chairman; Risk Management Chairman	12/31/21	05/01/22
Fall and Spring Chapter Audits Completed	Fall/Spring Semester Audit	President (GP)	12/31/21	05/01/22

Form Submissions



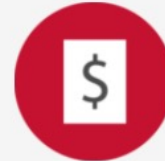
Roster



Officers



Recruitment



Statement



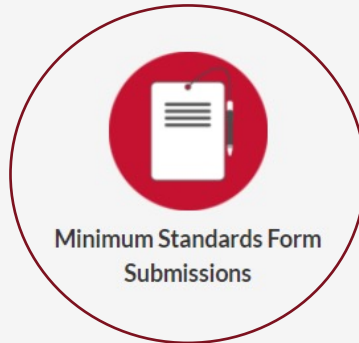
GreekLifeEdu



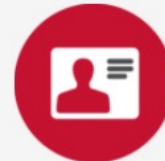
HQ Docs



ChecklistApp



Minimum Standards Form Submissions



Website Editor



MassMailerApp



OmegaFi



Chapter Profile



















Chapter Dashboards



Quick Start Guide

Form Submissions

Minimum Standards Forms

-  Fall Semester Audit (Due 12/31/2021) |  Incomplete >
-  Chapter Operations Documents (Due 12/31/2021) |  Incomplete >
-  Officer Risk Management Signature Form (Due 12/31/2021) |  Incomplete >
-  Chapter GPA Requirements (Due 12/31/2021) |  Incomplete >
-  Annual Budget (Due 12/31/2021) |  Incomplete >
-  Form 990 Tax Document (Due 5/1/2022) |  Incomplete >
-  Safe Social Events Plan (Due 12/31/2021) |  Incomplete >
-  Risk Management Programs (Drug & Alcohol and at least 1 other by 5/1/2022) |  Incomplete >

Risk Management Education Requirements

Minimum Standard:

- Completion of Fall & Spring risk management education programs with 85% attendance from current active members and 85% of current new members
- Fall Topic (mandatory):
 - *Drug & Alcohol Abuse*
- Spring Topic (must choose 1):
 - *Hazing & Fraternity Education*
 - *General Insurance & Risk Management*
 - *Criminal Liability & Basic Legal Concepts*
 - *Sexual Violence Prevention*
 - *Fire Prevention*

Upcoming Monthly Meetings

Upcoming Monthly Meetings

You can find the registration links and other information regarding the monthly meetings at <http://www.phikappapsi.com>. Email reminders will also be sent.

- Wednesday, February 9th @ 8:00pm ET
- Wednesday, March 9th @ 8:00pm ET
- Wednesday, April 13th @ 8:00pm ET

Agenda Recap

- Spring Billing & Roster Updates
- Insurance – Additionally Insured
- ASCEND – Officer Trainings
- In-Person Programming
- Chapter Advisor Training
- Founders' Day 2022
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QUESTIONS?

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