

# President (GP)

## **Introductions to Facilitate**

- Office of Fraternity & Sorority Life
- IFC/Greek Council
- HQ Staff
- Chapter advisory team
- House Corporation Officers
- *Other relevant contacts on campus*

## **Committee Appointments**

- All committee chairmen should be appointed by the GP
  - *Committee chairmen are appointed, NOT elected*
  - *The president needs to trust a chairman's ability to carry out their respective duties, especially those with significant liability (i.e., risk management, fraternity education, membership recruitment)*
- Appoint one (1) active member to the Charge Review Committee
- Appoint five (5) impartial, active members to the Grievance Board
- Appoint three (3) active members to the Governing Committee

## **Documents and Processes**

- Ensure all new positions are updated on the Phi Psi Portal
- Ensure all chapter documents (bylaws, code of conduct, etc.) are maintained
- Accreditation & Risk Management
  - *Determine any outstanding education programs or form submissions*
- IFC Policies
- Ritual Knowledge
  - *Formal Pledging Ceremony*
  - *Initiation Ceremony*
  - *Alumni Induction Ceremony*
- Chapter Meetings
  - *Set a meeting agenda & provide to all members*
  - *Conduct meetings using [Robert Rules of Order](#)*

# Vice President (VGP)

## **Committee Management/Leadership**

- The VGP oversees all committee chairmen
- The VGP supports the GP with chairman selections
- Delegate goals & tasks to committee chairmen
- Ensure the finance committee's involvement in budget management
- Ensure the risk management chairman's knowledge of all policies
- Ensure the fraternity education chairman's commitment to hazing prevention

## **Chapter Governance & Membership Accountability**

- Charge Review Committee
  - *Consists of the VGP, Hi, and 1 other active member in good standing appointed by the GP*
  - *They are responsible for examining charges that brothers submit to the BG and determining whether those charges are sent to the Grievance Board*
- Grievance Board
  - *The Grievance Board consists of five (5) impartial members of the chapter, appointed by the GP*
  - *The board will report their findings from any charges submitted to them from the Charge Review Committee to the chapter at the next chapter meeting, unless deemed otherwise by the chapter.*
- Governing Committee
  - *The Governing Committee consists of the executive officers GP, VGP, P, AG and BG and at least three other undergrad members of the chapter appointed by the president*
  - *The committee exercises general supervision over chapter governance.*

# Treasurer (P)

## **General Tasks**

- Change authorized name on the chapter's bank account
- Ensure the newly elected treasurer is reported on the Phi Psi Portal so he can receive the appropriate access to OmegaFi
- Review chapter accounts and outstanding invoices
- Review any current payment plans

## **Financial Management**

- Set dues and determine processes for collecting
- Reconcile any outstanding invoices
- Maintain all tax exemption documents, including previous years' IRS Form 990
- Be familiar with the national dues & premiums, billing dates & due dates

## **Finance Committee**

- The treasurer is on the finance committee but does not serve as chairman

## **Tax Exemption**

- Know your chapter's EIN
- Find previous years' IRS Form 990 filings for tax exemption status

# Corresponding Secretary (AG)

## **Phi Psi Portal**

- Update new officers on [portal.phikappapsi.com](http://portal.phikappapsi.com)
- Report all new members within seven (7) days of induction
- Report all initiates within seven (7) days of the initiation ceremony
- Identify all tracking abilities on *Chapter Dashboards*

## **Accreditation / Minimum Standards**

- Familiarize yourself with the chapter's requirements for the National Fraternity's accreditation process (minimum standards, risk management education, etc.)

### **Hi (Chaplain)**

- Ritual
  - Conduct ritual review with chapter (see ritual book for ‘reflections’)
  - Inventory of ritual regalia
  - Ensure all ritual regalia is in good condition
  - Initiation
    - Conduct practice run prior to actual ceremony
- Common Responsibilities
  - Chaplain Remarks (during chapter meeting)
  - Providing Proper Community Resources to Member in need
  - Mental Health Check-ins

### **Phu (Sergeant at Arms)**

- Parliamentarian
- Works with the Risk Management Chair when planning a registered event
- Protects the Ritual from nonmembers
- Maintains order in the chapter room

### **BG (Recording Secretary)**

- Record minutes
- Distribute minutes to chapter
- Ensure & maintain long term storage of chapter documents

### **SG (Historian)**

- Set up time for composite
- Takes pictures of events from the chapter
- Cut newspaper clippings from newspaper that pertains to a brother or chapter
- Keeps records for accreditation packet
- Post brother of the week
- Manage social media accounts

### **Alumni Relations Committee Chairman**

- Contacts alumni on homecoming, new member induction ceremony, initiation, alumni events
- Keep in contact with the housing board president and chapter advisor on a consistent basis.
- Newsletter
- Alumni Events (1 per semester)

### **Finance Committee Chairman**

- 990 forms
- Maintain tax-exemption status
- Setting up budget
- Keep in contact with money service group coordinator
- Helping brothers set up budgets
- Making sure that members pay dues
- Keep up with national dues
- Maintain a budget request process
- Managing OmegaFi

### **Fraternity Education Committee Chairman**

- Enter new members on Phi Psi Portal
- Have the new members complete *Embar*
  - You can track on Portal via Chapter Dashboards
- Work with the Career Services, Study Abroad offices, Health services, and cultural centers to plan educational, career development/professional development seminars for the chapter/new member classes
- Ensure the new member period does not exceed 6 weeks
- Identify an important philanthropic cause for the chapter
- Facilitate *New Member Education* meetings to develop New Members into Active Members in the Phi Kappa Psi Fraternity

### **Recruitment Committee Chairman**

- Create contact list
- Set dates for recruitment
- Set up brothers to execute various tasks
- Create a list of standards which members must meet to receive a bid (e.g., grades, values, etc.)
- Teach the chapter the art of pre-closing
- Understand the chapter's "brand" and communicate that to all members

### **Risk Management Committee Chairman**

- Review FIPG policies with chapter
- Abide by IFC policies & educate members
- Abide by HQ polices & educate members
- Actively plan the six risk management education programs
- Inform chapter of new national and college rules