



PHI KAPPA PSI **Chapter Operations**

September 2, 2026

PHI KAPPA PSI FRATERNITY

Meeting Agenda

Explore and Pivot

Year-at-a-Glance

Corresponding Secretary Weekly Emails

Census, Dues & Billing Schedule

Review of Membership Statuses

Reporting New Members

Minimum Standards Requirements

Risk Management Education

Chapter Services

Fraternity and Sorority Experience Survey

New Member Education

Volunteer Handbook

Parent and Family Webinar

New Ritual Books

Questions?

PHI KAPPA PSI FRATERNITY

Explore & *Pivot*

EXPLORE

November 8-11, 2026 | Minneapolis
November 8-11, 2026 | Houston
*January 3-6, 2027 | NYC



PIVOT

March 14-20, 2027 | Tampa, FL



2027 Capitol Hill Visits

Washington, DC

February 22-24, 2027

Applications will be sent out next week



Important Upcoming Dates

PHI KAPPA PSI FRATERNITY

2026-27 YEAR AT A GLANCE

AUGUST

1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31

SEPTEMBER

1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30

OCTOBER

1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31

NOVEMBER

1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30

DECEMBER

1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31

JANUARY

1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31

FEBRUARY

1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28

MARCH

1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31

APRIL

1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30

MAY

1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31

JUNE

1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30

JULY

1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31

Semester School Census/Billing

- Rosters due September 8th
- Census taken September 9th
- Chapters will be invoiced according to their roster size on Phi Psi Portal

Quarter School Census/Billing

- Rosters due October 6th
- Census taken October 7th

Chapter Operations Call

- Wednesday, October 7th

PHI KAPPA PSI FRATERNITY

CHAPTER OFFICER CALENDAR

**SUBSCRIBE
and SYNC all
IMPORTANT
DATES directly to
YOUR PHONE!**



Corresponding Secretary Bi-Weekly Emails

Last week, we relaunched our enhanced communication support for Corresponding Secretaries.

- **Email updates sent at the end of every other week**
- **Important topics and action items for chapter meetings**
- **Direct links to our AG Feed (phikappapsi.com/ag-feed) – a dedicated landing page with detailed information and resources**

2026–2027 Dues & Premiums (Independently Owned House or No House)

General Fraternity Fees' Active Member

Any undergraduate brother that joined the chapter prior to the current billing term.

\$584
Total Annual Fees

\$292 **\$292**
Due Fall Term Due Spring Term

Fee Breakdown

\$187/term
National Dues

\$95/term
Liability Insurance

\$10/term
Canonsburg Assessment

General Fraternity Fees New Member (Fall)

Any undergraduate brother that joined the chapter during the fall term.

\$702
Total Annual Fees

\$410 **\$292**
Due Fall Term Due Spring Term

Fee Breakdown

\$50
New Member Fee
One-time fee charged at time of joining.

\$250
Initiation Fee
One-time fee charged when initiated.

\$110
First Term Dues
Billed to all new members reported during the semester/term..

General Fraternity Fees New Member (Spring)

Any undergraduate brother that joined the chapter during the spring term.

\$410
Total Annual Fees

\$0 **\$410**
Due Fall Term Due Spring Term

Fee Breakdown

\$50
New Member Fee
One-time fee charged at time of joining.

\$250
Initiation Fee
One-time fee charged when initiated.

\$110
First Term Dues
Billed to all new members reported during the semester/term..

INDEPENDENTLY HOUSED CHAPTERS

Alabama Gamma
Arizona Beta
California Beta
California Kappa
Delaware Alpha
Florida Alpha
Georgia Beta
Illinois Epsilon
Illinois Eta
Illinois Iota
Illinois Theta
Illinois Zeta

Indiana Eta
Indiana Gamma
Indiana Iota
Kentucky Beta
Maryland Alpha
Maryland Delta
Minnesota Delta
Nebraska Beta
New Jersey Delta
New Jersey Epsilon
New York Kappa
New York Theta

Ohio Beta
Ohio Delta
Ohio Epsilon
Ohio Eta
Ohio Mu
Ohio Omicron
Ohio Pi
Ohio Theta
Ohio Xi
Pennsylvania Alpha
Pennsylvania Beta
Pennsylvania Eta
Pennsylvania Iota
Pennsylvania Phi
Pennsylvania Sigma
South Carolina Beta
Tennessee Delta
Texas Epsilon
Texas Eta
Texas Zeta
Virginia Beta
Virginia Theta
Virginia Zeta
Wisconsin Gamma

PHI KAPPA PSI FRATERNITY

2026–2027 Dues & Premiums (Corporation Owned House)

General Fraternity Fees' Active Member

Any undergraduate brother that joined the chapter prior to the current billing term.

\$630

Total Annual Fees

\$315

Due Fall Term

\$315

Due Spring Term

Fee Breakdown

\$187/term

National Dues

\$118/term

Liability Insurance

\$10/term

Canonsburg Assessment

General Fraternity Fees New Member (Fall)

Any undergraduate brother that joined the chapter during the fall term.

\$725

Total Annual Fees

\$410

Due Fall Term

\$315

Due Spring Term

Fee Breakdown

\$50

New Member Fee

One-time fee charged at time of joining.

\$250

Initiation Fee

One-time fee charged when initiated.

\$110

First Term Dues

Billed to all new members reported during the semester/term..

General Fraternity Fees New Member (Spring)

Any undergraduate brother that joined the chapter during the spring term.

\$410

Total Annual Fees

\$0

Due Fall Term

\$410

Due Spring Term

Fee Breakdown

\$50

New Member Fee

One-time fee charged at time of joining.

\$250

Initiation Fee

One-time fee charged when initiated.

\$110

First Term Dues

Billed to all new members reported during the semester/term..

CORPORATION HOUSED CHAPTERS

Alabama Alpha
California Delta
California Epsilon
California Eta
California Gamma
California Theta
Colorado Alpha
Illinois Delta
Indiana Alpha
Indiana Beta
Indiana Delta
Indiana Epsilon
Indiana Zeta
Iowa Alpha
Iowa Beta
Kansas Alpha
Louisiana Alpha
Louisiana Beta
Massachusetts Beta
Massachusetts Gamma
Michigan Beta
Minnesota Beta

Minnesota Gamma
Mississippi Alpha
Missouri Alpha
Nebraska Alpha
Ohio Iota
Ohio Lambda
Ohio Nu
Oklahoma Alpha
Oregon Alpha
Oregon Beta
Pennsylvania Lambda

Pennsylvania Theta
Rhode Island Beta
Tennessee Epsilon
Texas Alpha
Texas Beta
Virginia Alpha
Washington Alpha
West Virginia Alpha

PHI KAPPA PSI FRATERNITY

MEMBERSHIP STATUSES

- **New Member**
 - *Dropped New Member*
- **Undergraduate**
 - *Active*
 - *Member Off Campus*
 - *Suspended*
 - *Expelled*
- **Alumnus**



UNDERGRADUATE SUB-STATUS

- A **Member off Campus** is a person who is away from campus for a limited amount of time due to:
 - Co-Op/Internship
 - Study Abroad
- A **Suspended** member is an individual who has been suspended by the chapter while an undergraduate.
 - A suspension can last up to the point when the undergraduate member graduates from their institution.
 - The chapter must formally adjudicate a member in order to suspend them. When reporting the suspension, you will be asked to enter details of the grievance or judicial process
- An **Expelled** member is an individual who has been removed from the Fraternity at large and stripped of his letters. This status can be proposed by the chapter but is not final until ratified by the Executive Council.

How to Report New Members

The screenshot displays the recruitment interface for Phi Kappa Psi Fraternity, divided into four main sections: Potential New Member, Bid Offered, Bid Accepted, and Deferred. The 'Bid Accepted' section is active, showing a list of new members. A yellow circle highlights the 'Report' button in the top right corner of the 'Bid Accepted' section, with an orange arrow pointing to it. The 'Report' button is a red rectangle with a white flag icon and the word 'Report' in white text. The 'Bid Accepted' section also includes a search bar at the top and a list of members with their names, email addresses, and a 'NEW' badge. The 'Potential New Member' and 'Deferred' sections show 'No Potential New Members yet.' The 'Bid Offered' section also shows 'No Potential New Members yet.'

Search Potential New Members

Search

Add Potential New Members

Potential New Member

No Potential New Members yet.

Bid Offered

No Potential New Members yet.

30 Bid Accepted

Report

Kyle Williams
kylegwilly@gmail.com

NEW

Zach Yoder
yoderzach4@gmail.com

NEW

eric stojkovich
ericstojk@gmail.com

NEW

Roberto Bulleri
roberto.a.bulleri@gmail.com

NEW

Jake Gaul
jacobgaul2@gmail.com

NEW

Deferred

PNMs who may join later but not this recruitment period.

No Potential New Members yet.

PHI KAPPA PSI FRATERNITY

How to Report New Members

Quick Start Guide

How to access the Quick Start Guide

- Log into the Phi Psi Portal (portal.phikappapsi.com).
- Click on your chapter name in the top right corner of the Home page.
- Click on the "Quick Start Guide" tile.
- Refer to the videos:
 - "How do I add New Members to the Recruitment tool?"
 - "How do I report New Members to the Headquarters?"

*These are also located on the Phi Psi Portal Landing Page via Phi Psi Portal FAQs

2026 – 2027 Minimum Standards Requirements

Form Submissions

All forms must be completed on the Phi Psi Portal

1. Chapter Operations Documents
2. Chapter Information Audit
3. Minimum GPA Requirements
4. Chapter Grade Report (previous term)
5. Annual Budget
6. Form 990 Tax Document
7. Safe Social Event Plan
8. Member Safety Program (select from 7 topics)

Member Education

All courses can be found on Compass through the Phi Psi Portal

9. Completion of *Risk Management Policy and General Insurance* by all active members
10. Completion of *Embark* by 100% of new members
11. Completion of *Ascend* by designated officers & chairmen

Financial Performance

12. No invoices aged over 90 days for the academic year

2026 – 2027 Minimum Standards Due Dates

Deadline #1 - Sunday, October 18, 2026

- Chapter Audit
- Chapter Operations Documents
- Chapter GPA Requirements
- Annual Budget
- Safe Social Event Plan
- Completion of Risk Management and General Insurance Module

Deadline #2 - Sunday, December 13, 2026

- Chapter Grade Report #1 (Spring 2026 Term Report)
- Completion of Embark by 100% of new members who initiated before December 13, 2026

Deadline #3 - Sunday, June 13, 2027

- Form 990 Tax Document
- Member Safety Education Program
- Chapter Grade Report #2 (Fall 2026 Term Report)
- Completion of Embark by 100% of new members who initiated between December 14, 2026, and June 13, 2027

2026 – 2027 Minimum Standards Submissions

Standard	Form / Access	Completed By	Deadline
Chapter Audit Submission	Chapter Audit	President (GP)	10/18/2026
All active members complete the <i>Risk Management & General Insurance</i> module on Compass	<i>Phi Psi Portal > Compass</i>	<i>Progress tracked via Phi Psi Portal through Chapter Dashboards</i>	10/18/2026
Chapter Operations Documents Submission	Chapter Operations Document	Corresponding Secretary (AG)	10/18/2026
Minimum GPA Requirements Submission	Chapter GPA Requirements	Scholarship Chairman	10/18/2026
Annual Budget Submission	Annual Budget	Treasurer (P)	10/18/2026
Safe Social Event Plan Submission	Safe Social Event Plan	Risk Management Chairman	10/18/2026
Chapter Grade Report Submissions	Chapter Grade Report Submission #1 Chapter Grade Report Submission #2	President (GP)	#1: 12/13/2026 #2: 06/13/2027
Completion of <i>Embark</i> by 100% of new members a. (who are initiated before 12/14/2025) b. (who are initiated before 06/14/2026)	<i>Phi Psi Portal > Compass</i>	<i>Progress tracked via Phi Psi Portal through Chapter Dashboards</i>	a. 12/13/2026 b. 06/13/2027
Completion of the <i>Ascend</i> officer training module on Compass within 45 days of beginning role	<i>Phi Psi Portal > Compass</i>	<i>President; Vice President; Treasurer; Corresponding Secretary; Fraternity Educator; Risk Management Chairman; Recruitment Chairman; Chaplain</i>	<i>Within 45 days of beginning role</i>
No invoices aged over 90 days for academic year	N/A	N/A	07/01/26 – 06/30/27
Completion of one (1) member safety educational program	Member Safety Educational Program	Risk Management Chairman	06/13/2027
Form 990 Tax Document submitted to the IRS and National Fraternity	Form 990 Tax Document	Treasurer (P)	06/13/2027

PHI KAPPA PSI FRATERNITY

Risk Management Education

2026–2027 Annual Requirements

- **ALL ACTIVE MEMBERS** must complete the Risk Management & General Insurance course in Compass by 10/18/2026
- **Chapter must complete 1 Member Safety Program:**
 - Mental Health
 - Drug & Alcohol Abuse
 - Hazing & Fraternity Education
 - Criminal Liability & Basic Legal Concepts
 - Sexual Violence Prevention
 - Fire Prevention
 - Bystander Intervention

Accessing Risk Management & General Insurance

 PHI KAPPA PSI
FRATERNITY

Home My Learning



Click the buttons to choose your Learning Path



Click the buttons to choose your Learning Path



Training Library

 Risk Reduction ▲

 RMGI

RMGI



Required Risk Management & General Insurance Course
Due: 10/18/2026 (Due in 52 Days)
This content is recurrent training.
This course reviews the Phi Kappa Psi Risk Management and General Insurance policies.

Chapter Dashboards & Standards Tracking

Member Compliance

[Incomplete Agreements](#)[Embark by Member](#)[RMI by Member](#)

Forms and Modules assigned to members to be completed

Program	Description	Total Required Completion
Phi Kappa Psi Membership Agreement	All Collegiate Member are required to sign agreement once	✅ 33/33 Standard Met
Embark Program	All New Members this year are required to complete	✅ 0/0 Standard Met
Risk Management & General Insurance Program	All Returning Members this year are required to complete	⚠️ 24/33 Standard Not Met

Officer Compliance

[Ascend by Position](#)

Officers are required to take ASCEND courses specific to their position within 45 days of entering their role.

Program	Total Modules Completed
Ascend Program	⚠️ 2/6 Standard Not Met

Chapter Services

National
Organization
Touchpoints:

Chapter Leadership – 2 Touchpoints per month

Greek Advisor – 1 Touchpoint per term

Chapter Advisor – 1 Touchpoint per term

Chapter Support Survey 2026-
2027



Fraternity & Sorority Experience Survey

We want to hear from you!

In a partnership with the Piazza Center at Penn State, we want to know more about the undergraduate Phi Psi experience. This will be our fourth administration of the survey since 2022.

The survey will be distributed via email in the coming weeks, and student responses will be anonymous.

Members will receive weekly reminder emails to complete the survey until the collection window is closed.



Embark Access for New Members



[Home](#) [Phi Psi Portal FAQs](#) [Get Involved](#) [Resources](#) [Email Archives](#) [Member Referral](#) [Chapter Dashboard](#)



Hello, [REDACTED]

New Member at [REDACTED]
Need help accessing your chapter? [Click here](#)

Chapter Stats — Top 10

Chapters ranked by total active member count · Updated daily

[View Full Dashboard →](#)

[MEMBERSHIP](#)

[SERVICE HOURS](#)

[MIN STANDARDS](#)

1	Mississippi Alpha	members	314
2	Alabama Alpha	members	210
3	Tennessee Epsilon	members	209
4	Missouri Alpha	members	204
5	Iowa Alpha	members	195
6	Texas Alpha	members	164
7	Oregon Beta	members	147

Quick Links

Jump to the tools you use most



[Update My Profile](#)



[Event Registration](#)



[My Role History](#)



[My Event History](#)



[My Tools](#)



[Find a Member](#)



[Pay Chapter Invoices](#)



[My Learning \(Compass\)](#)



[Report Lost Brothers](#)



[Mentoring Advantage](#)



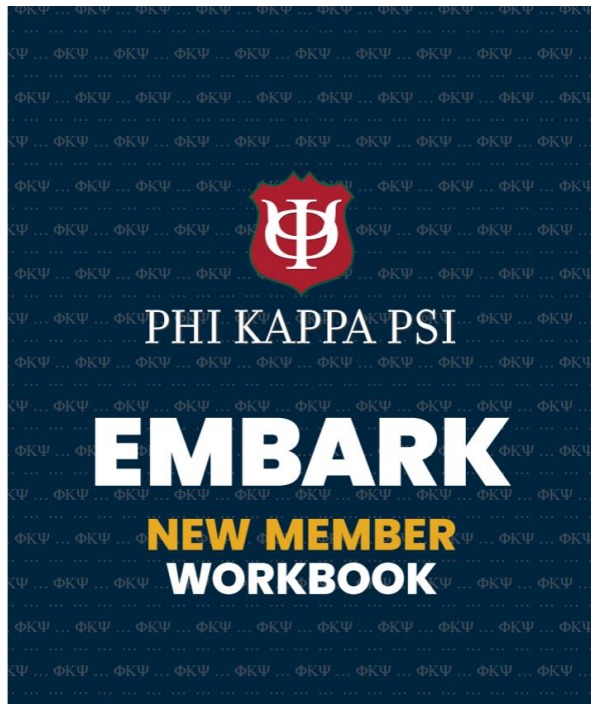
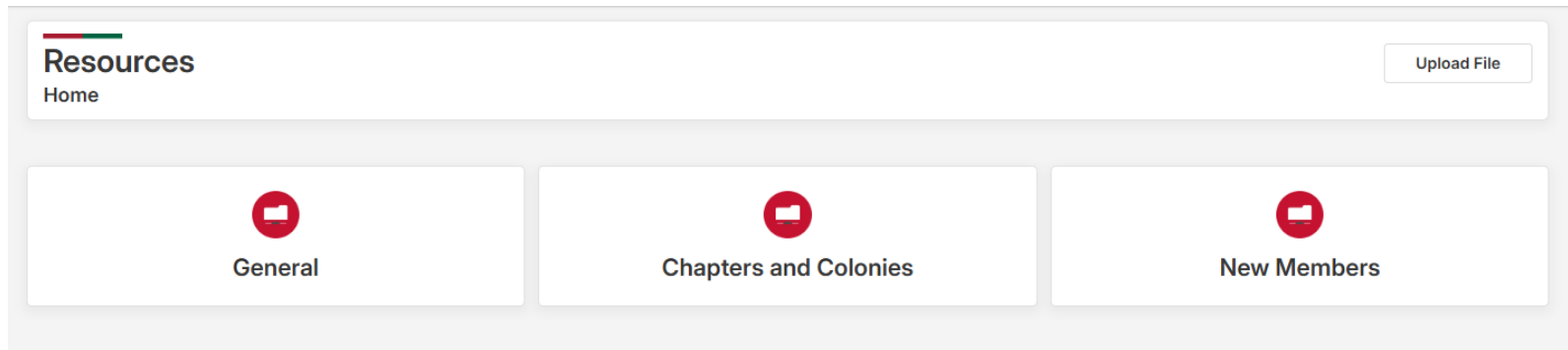
[Scholarships & Grants](#)



[Store](#)



Embark Access for New Members



WEEK THREE: SPIRITUALITY – CARING FOR YOURSELF & OTHERS

PRE-WORK

Prior to this meeting, you should complete the Week Three online content in Compass:

- Mind, Heart and Soul
- Let's Talk About Mental Health
- Handling Stress
- Coping Mechanisms
- Mental Health Conversation Techniques

REFLECTING ON SPIRITUALITY

When have you felt most supported by others, and how can that shape how you support your brothers?



MIND, HEART, AND SOUL

Phi Kappa Psi believes in holistic development of members and utilizes the Mind, Heart, and Soul framework. This model guides members in achieving optimal wellness by emphasizing growth in three core domains each containing dimensions that reflect our Creed and opportunities for members to achieve wellness and have a healthy and rewarding life.

MIND

Areas of wellness focused on how you think, learn, and make contributions.

- > **Intellectual Wellness:** Creativity and growth through gaining knowledge and skills.
- > **Occupational Wellness:** Contributing and finding purpose through work.
- > **Financial Wellness:** Understanding finances and building a strong financial future.

HEART

Areas of wellness focused on relating to people, environment, and lived experiences.

- > **Physical Wellness:** Incorporating healthy habits into your regular routine.
- > **Environmental Wellness:** Being aware of how you interact and impact your community.
- > **Emotional Wellness:** Navigating emotions and coping with situations.

SOUL

Areas of wellness focused on values, meaning, and connections.

- > **Spiritual Wellness:** Knowing and living according to your beliefs, values, and ethics.
- > **Social Wellness:** Curating a network that provides belonging and connection.
- > **Cultural Wellness:** Reflection and awareness of differences to promote understanding.

- The **New Members** folder includes the New Member Workbook.
- This can be either **downloaded or printed out**.
- New members should have access to this for all in-person Embark meetings.

Embark Access for New Members

Home My Learning





Click the buttons to choose your Learning Path





Alcohol Awareness - Lesson 3
Due: 12/13/2026
This course provides a review on what happens to your body after you consume alcoholic beverages, as well as how you can keep others safe during, and after, alcohol consumption.
This course should take approximately 20 minutes to complete.

Passed
[Launch](#)



Hazing Awareness & Prevention
Due: 12/13/2026
This course describes and defines hazing, identifies members' responsibilities, describes how to report violations, and defines the consequences of hazing.
This course should take approximately 30 minutes to complete.

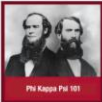
Passed
[Launch](#)



Sexual Assault Prevention
Due: 12/13/2026 (Due in 107 Days)
This course describes key terms associated with sexual assault, defines consent, identifies the prevalence of sexual assault on college campuses, recognizes why bystanders do not intervene, and describes members' responsibilities.
This course should take approximately 20 minutes to complete.

Not Attempted
[Launch](#)

Week 2



Phi Kappa Psi 101
This Content has the following prerequisites:
Sexual Assault Prevention
Due: 12/13/2026 (Due in 107 Days)
In this course, you will learn the basics of Phi Kappa Psi and some of the things that make us unique. With a history of over one hundred and seventy years, we will cover important milestones and points of interest.
This course should take approximately 20 minutes to complete.



The Values and Creed of Phi Kappa Psi
This Content has the following prerequisites:
Phi Kappa Psi 101
Due: 12/13/2026 (Due in 107 Days)
Joining Phi Kappa Psi means taking an oath and committing yourself to upholding the values of the Fraternity. This course provides foundational information about our core values and The Creed of Phi Kappa Psi.
This course should take approximately 10 minutes to complete.



Authentic Leadership
This Content has the following prerequisites:
The Values and Creed of Phi Kappa Psi
Due: 12/13/2026 (Due in 107 Days)
How do you effectively lead in a fraternity? What are ways you can build trust, strong relationships, and a positive culture? This is what authentic leadership is all about! Authenticity shouldn't just be a buzzword, rather it should be the daily practice of aligning your values and actions. This course explains how you can be an authentic leader, best work with others, and help your chapter thrive.
This course should take approximately 20 minutes to complete.

Embark Resources for Fraternity Educators



[Home](#) [Phi Psi Portal FAQs](#) [Get Involved](#) [Resources](#) [Email Archives](#) [Member Referral](#) [Chapter Dashboard](#)

Resources

[Home](#) > [Chapters and Colonies](#) > [Fraternity Education Folders](#)



Fraternity Educators



New Members

- The primary resource for Fraternity Educators is the **Embark Facilitator Guide** available in the Phi Psi Portal.
- **Implementing Embark** is a course available in Compass via Additional Learning or the Fraternity Educators learning path.

Resources

[Home](#) > [Chapters and Colonies](#) > [Fraternity Education](#) > [Fraternity Educators Resources](#)

Filter by Folder ▾

13 Records

Title	Publication Date	Action
0 - Embark Facilitator Guide	Aug 08, 2025	Download
0 - Embark New Member Workbook	Aug 08, 2025	Download
2023 Campfire Workbook	Dec 09, 2024	Download
Big Brother Ceremony	Aug 12, 2026	Download
Elevate Resources for Fraternity Education	Aug 07, 2025	Download
Embark 101	Dec 09, 2024	Download
Induction Ceremony	Aug 12, 2026	Download
NIC Brotherhood Building Activities Guide	Apr 09, 2025	Download
Relationship Building Activity - Cross the Line	Sep 08, 2025	Download
Relationship Building Activity - Four Corners	Sep 08, 2025	Download
Relationship Building Activity - Human Scavenger Hunt	Sep 08, 2025	Download
Relationship Building Activity - Telephone Chain	Sep 08, 2025	Download
The Manual of Phi Kappa Psi	Dec 09, 2024	Download

Volunteer Handbook for Advisory Teams



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Volunteer Handbook



*Scan here to download
the Volunteer Handbook!*

PHI KAPPA PSI FRATERNITY

Parent & Family Engagement

2026–2027 Webinar Series

Orientation for Parents & Families of New Members

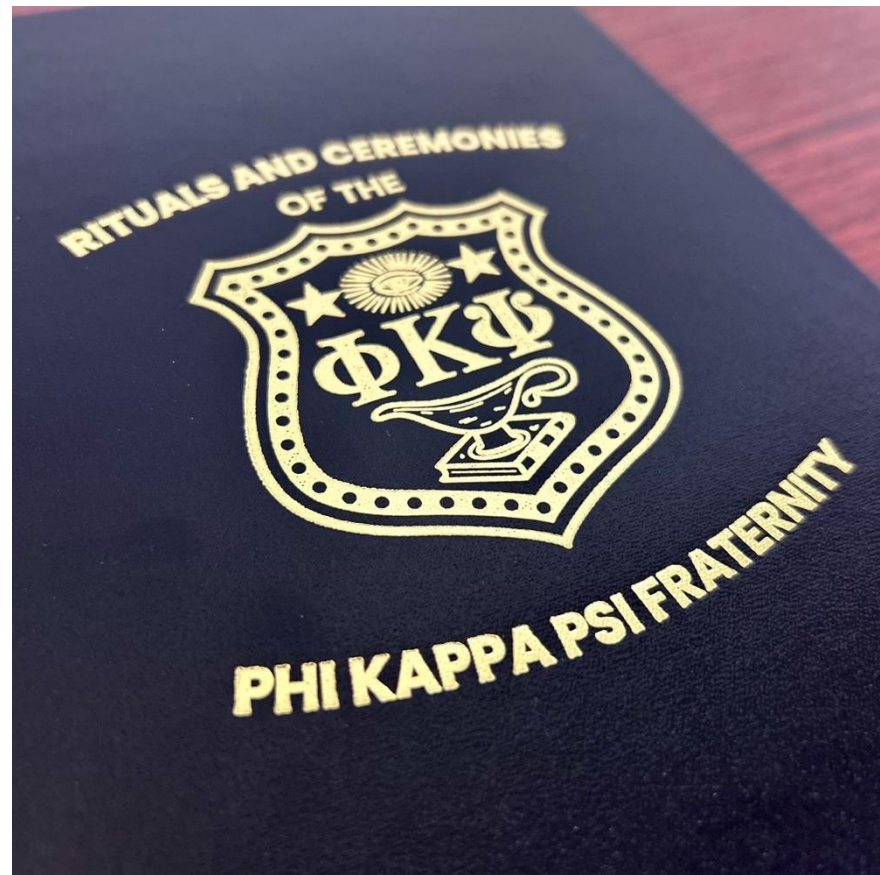
- ✓ *Wednesday, September 30th @ 8:00pm ET*
- ✓ *Tuesday, October 27th @ 8:00pm ET*
- ✓ *Wednesday, March 10th @ 8:00pm ET*



PHI KAPPA PSI FRATERNITY

New Ritual Books Are on the Way!

Each chapter will soon receive **3 new copies** of the ***Ritual Book***!



PHI KAPPA PSI FRATERNITY

FOLLOW US ON SOCIAL!



@phikappapsi



Next Chapter Operations Call

Wednesday, October 7th @ 8:00pm ET

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Questions?

PHI KAPPA PSI FRATERNITY