

EXPANSION GUIDE

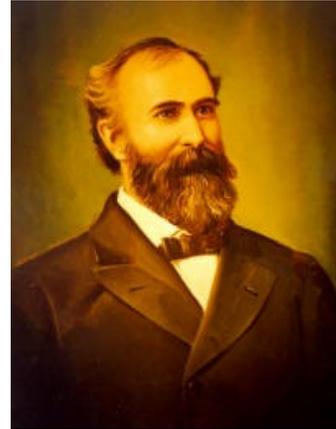
PHI KAPPA SIGMA'S
GUIDE TO STARTING
A NEW CHAPTER

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PHI KAPPA SIGMA – HISTORY AND VALUES

Samuel Brown Wylie Mitchell, while attending the University of Pennsylvania, founded Phi Kappa Sigma on August 16th, 1850. As the only fraternity founded at the University of Pennsylvania, Phi Kappa Sigma quickly grew to be located at some of the most prestigious schools across the country, becoming the largest and most innovative fraternity of its time prior to the Civil War.



Dr. Samuel Brown Wylie Mitchell

Phi Kappa Sigma's badge and crest are the same today as when they were designed by Dr. Mitchell at the Fraternity's founding. Both have always reflected the prominence of the Skull and Bones. Phi Kappa Sigma is affectionately known as the "Skulls" due to this symbol's prominence.

As Phi Kappa Sigma grew in size during its early years, the organization created many of the practices that are still used by most fraternities today.

As the fraternity took on more of a national presence, Phi Kappa Sigma became the first fraternity to hold national conventions. At the Convention of 1856 our Constitution & Acts were amended to create the first democratic governing system among fraternities based on Chapter representation. This practice continues today with undergraduate delegates to the convention voting on every change to our Constitution & Acts.



In 1860, this practice created the first fraternal non-discrimination clause as Phi Kappa Sigma delegates voted not to exclude any members from our organization based on superficialities such as race. This combined with our elimination of jeweled badges at the 1904 convention to eliminate class separation shows our steady commitment to valuing acceptance and understanding the relevance of different perspectives and backgrounds in the fraternal experience.

More recently in 1998, Phi Kappa Sigma delegates voted to adopt our Substance-free housing policy, "Dry Skulls," becoming one of the first national fraternities with blanket substance-free housing policies. Creating a safe living and learning environment for our members is paramount in achieving our goals in today's college culture.

Phi Kappa Sigma was also the first fraternity to publish a fraternity-wide magazine for its members as well as pioneered the Chapter Advisor system.

Phi Kappa Sigma Male College

Phi Kappa Sigma is the only fraternity in whose honor a college has been founded and named. As the first institute of higher learning in Arkansas, Phi Kappa Sigma Male College flourished for a short time before the Civil War made it impossible for the institution to continue. Despite the college's short existence, its ideals are still very much alive today exemplified in the lifelong personal development we espouse for all of our members. The College also physically continues today through sessions held at our biennial Grand Chapter conventions.



The "Silver Skulls"

Prior to the Civil War several members of Phi Kappa Sigma, especially in the South, began wearing membership badges with silver skulls adorning them, rather than the traditional gold. During the Civil War, this tradition took on even greater significance despite the boundaries created by the war. As letters from southern members were received, it was learned that wearers of the “Silver Skulls” were captured at certain battles and were being held in prison camps. Northern brothers immediately secured donations of clothing, money, and other necessities to forward to these destitute brothers. The practice was immediately reciprocated in the South and became the normal practice throughout the war.

Other letters surfaced after the war revealing that some northern and southern brothers had found each other on battle lines. They met at night when the fighting stalled, enjoyed each other’s company, and traded supplies and various luxuries of the times.



Two of our first alumni chapters were created in Cumberland and Baltimore, Maryland. During the Civil War both of these alumni chapters, known as the Sub-Epsilon Chapter and the Orphan Club respectively, were used as a refuge for northern and southern brothers to come together and mingle socially within the bonds of the fraternity. The Sub-Epsilon Chapter was created specifically for this purpose after the start of the Civil War.

The records of this early group relate how confederate ‘skulls’ were cleared through the Union lines in order that they may dine and dance with their northern “enemy” brothers at the St. Nicholas Hotel in Cumberland. The “Silver Skulls” nickname is still used by our southern chapters and is a firm reminder of the bonds and values that were so impressively exhibited during the most trying of times in Phi Kappa Sigma’s and our Nation’s history.

Alumni of Note

- Justice F. Lewis Powell Jr. (Deceased) - Supreme Court
- Tom Wolfe - Journalist and Novelist
- David F. Nolan - Libertarian Party Founder
- Derek Bok (Retired) - Harvard University President
- George David Low – Astronaut, Columbia Space Shuttle
- Roger Chaffee (Deceased) - Astronaut, Apollo 1
- Dr. James G. Roche (Retired) - Secretary of the Air Force
- John Curley (Retired) – Pres/CEO of Gannet Publishing
- Adolphus Busch IV, Anheuser Busch Vice President

The Objects of the Fraternity

“The Objects of Phi Kappa Sigma Fraternity shall be the promotion of good fellowship and the cultivation of the social virtues among our members; the protection of just rights and the advancement of the best interests, present and future, individual and collective, of all those who shall be associated together as members of this Fraternity; the encouragement of good scholarship and the breadth of training for our members; and cooperation in the educational and cultural programs of institutions of higher education in which our chapters are located.”

The Statement of Core Values

- ❖ We commit to the value of **Trust**, the foundation of a relationship based on a belief in oneself as well as others, which is earned and strengthened through experience. The value of trust is found in our reliance on each other and enables an open comfort in interacting with brothers.
- ❖ We commit to the value of **Honor**, staying true to a set of higher standards and morals in the face of adversity. Membership in Phi Kappa Sigma means a commitment to leading an honorable life.
- ❖ We commit to the value of **Respect**, which begins with yourself and the practice of the golden rule, "Do unto others as you would have them do unto you." This statement is the acceptance of the ideals of others. In order to move forward as a brotherhood, we must continue to consider each other's viewpoints.
- ❖ We commit to the value of **Knowledge**, the acquisition of thought, theory and principles following in the footsteps of our founding fathers in accordance with our oath of brotherhood. With this knowledge we will come closer to self-discovery, the improvement of society and the translation of knowledge into power.
- ❖ We commit to the value of **Wisdom**, a virtue gained through experiences of self and others. Wisdom is the application of knowledge and past experiences to make decisions regardless of the situation. Through sharing wisdom, a bond is formed between young and old, teacher and student; this bond is what brings us together.
- ❖ We commit to the value of **Responsibility**, by being reliable in the fulfillment of the objectives of our fraternity and our personal obligations, enduring the consequences of our actions.
- ❖ We commit to the value of **Integrity**, our inner foundation for holding true to our values of trust, honor, respect, knowledge, wisdom, and responsibility that guides us to make the best decisions.

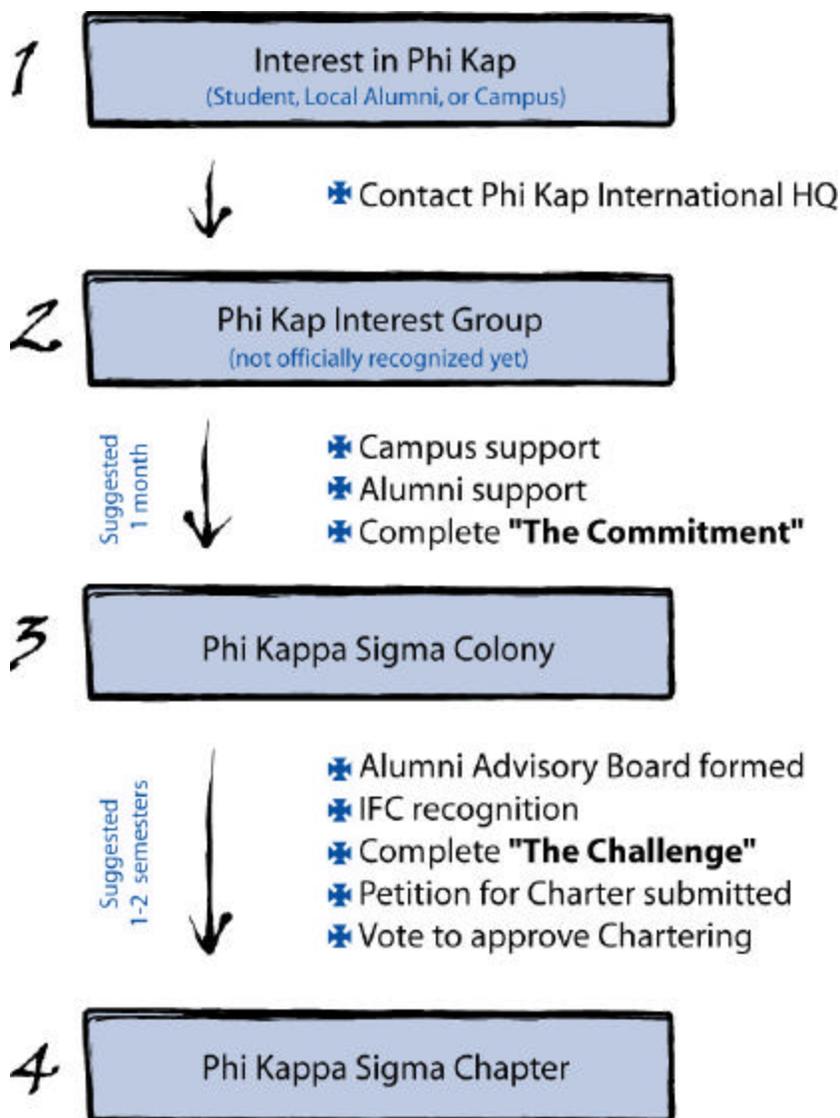
We have seen these values to be critical in the past; they will become even more important in the future.

Public Mottos

- ❖ **"Brotherhood is more than skin deep."** In 1858 Phi Kappa Sigma Chapters unanimously voted against having an all-white membership and become the first Fraternity to be anti-discriminatory. In 1904 members voted to ban jeweled badges, insuring social class would not be a source of separation within the brotherhood. Our Brothers choose men to become members based on the worth of their character, not superficialities like race, religion, or wealth.
- ❖ **"Once a Phi Kap, Always a Phi Kap"** Phi Kappa Sigma is more than an organization to be a part of during college; it is a valuable learning experience, life-long commitment, and philosophy of life. Our members graduate to become more than just productive members of society, but leaders that possess a foundation built on steadfast values and a duty to help their fellow man.
- ❖ **Stellis Aequus Durando – "Equal to the Stars in Endurance"** Our Fraternity has survived hardships, World Wars, and countless other obstacles, yet we still remain strong. Since 1850, Phi Kappa Sigma has been a durable and everlasting organization that will succeed for many years to come.
- ❖ **"Men of Honor since 1850"** The value of honor encompasses much of what Phi Kappa Sigma represents. Honoring your fellow man, campus, and community are essential to the fraternal experience. These values have been emboldened within our members since our founding; creating a significant history that works to enrich the Phi Kappa Sigma experience today.

THE EXPANSION PROCESS

Below is a simple outline of the entire expansion process. Step one is someone being interested in starting a new Chapter somehow, whether it is a student, alumnus, campus, or the International Headquarters that initiates the first interest. All expansion opportunities then start as the same thing, a small group of interested students. We define this as an interest group. This is an unofficial group until they become a colony. However, our Headquarters Staff and Expansion Committee will work aggressively with an interest group through our "Commitment" process to make that a reality. Once colony status is reached, our Headquarters Staff and an Alumni Advisory Board lead the support of the group through our "Challenge" process and eventually to chartering as a new chapter of Phi Kappa Sigma. Each stage in this simple outline is detailed further within this guide.



Expansion Criteria

We use objective criteria in 3 main categories to break down any opportunity for expansion. This is designed to predict the possibility for long term success of a chapter on that campus.

Specific Criteria

We look at the Campus Life and Support, Greek Life and Support, and Area Phi Kappa Sigma Support. Divided up among those categories are 16 statistics that we track for every campus we consider. Among these include campus size, freshman retention rate, on-campus living percentage, average fraternity size, and local alumni presence.

Quality of Members

Some of these points tell us more than others, but the whole rating is designed to give us a starting point. From the data we gather, the next important item is the quality of the individuals involved. We take a close look at interest group or potential colony members when starting a new group. Our aim is to ensure that the individuals involved are aligned with our values and self-motivated to excel in within the fraternity experience.

Colony members must maintain a 2.5 GPA or above and be involved in at least one other student organization. Others standards including a stronger average GPA standard for the group are set according to specific campuses.

The Roadmaps

Once we decide to move forward with expansion the standards and criteria are set forth by two formal processes. *The Commitment* is the process of an interest group becoming a colony. And *the Challenge* is the process of a colony becoming a chapter. Both are tiered goal based systems designed to give a thorough roadmap to our new groups on how to meet our minimum requirements to advance to the next level of recognition within Phi Kappa Sigma.

Look further in this manual for information on the Commitment (which must be completed to become a Phi Kappa Sigma Colony) and the Challenge (which must be completed in order to petition for Chartering and to become a Chapter).

Expansion Support

Resources

Phi Kappa Sigma International aggressively supports interest group development and will provide all materials needed in building a Chapter. These materials are provided to the Colony. Phi Kap will give each member our "Skull Sessions" new member education book, which teaches the history of our fraternity, and a new member pin. Various officer manuals will be provided to assist in the training of Colony officers.

Upon chartering, we will present the Colony with all Ritual materials needed for a Chapter of Phi Kappa Sigma. When the Colony is chartered, the members will be initiated by International Headquarters staff, local Chapters, local alumni, and volunteers. Phi Kappa Sigma will supply each member with a member certificate and membership badge. (The certificate and badge are included in the one-time initiation fee)

Throughout the interest group and colony processes Phi Kappa Sigma will provide goal setting timelines and the support and advice needed to appropriately navigate through each. Phi Kappa Sigma will also guide you to several other resources noted throughout this guide including but not limited to:

- ❖ Undergraduate and alumni visitors
- ❖ Alumni Advisory Board
- ❖ Campus resources
- ❖ Big Brother Chapter
- ❖ Staff visits
- ❖ Local, Regional, and National educational opportunities

Leadership Development

Our Fraternity feels that a Colony must develop the skills of brotherhood and fraternity management in order to insure steady growth as a Chapter. We focus our Colony activities around the development of these skills. These skills include financial stability, community service, academic excellence, and social responsibility.

Our goal is continuity and stability for the Chapter in the years to come. As a result, we have developed our expansion program so that each Colony is thoroughly prepared for their life as an active Chapter.

Also available are additional educational opportunities outside of the colony and chapter:

- ❖ **“Grand Chapter”** – The first fraternity national convention ever remains to this day a great opportunity for Phi Kappa Sigma members. All amendments to the constitution are voted on by undergraduate delegates in a true democratic setting. Grand Chapter is also a great opportunity to meet brother from across the country and to attend educational workshops of all kinds.
- ❖ **“Men of Honor”** – As our national leadership seminar, “Men of Honor” is an annual retreat for leaders from every chapter and colony to better their leadership and fraternity operational skills. The graduates of this program always return to the chapter or colony with great enthusiasm and the tools needed to create positive change.
- ❖ **“Skull Sessions”** – These are our regional leadership seminars. The sessions take place throughout the year and build on the leadership and fraternity operational skills taught at “Men of Honor”. These sessions focus more on personal development and look beyond college to develop life skills.
- ❖ **Local Workshops** – Our volunteers and staff members routinely provide more focused workshops for one or many chapters and colonies. These workshops can address topics including but not limited to recruitment, financial management, values, fraternity management, and campus programming.

Scholarship

We pride ourselves in having one of the best scholarship programs of any International Fraternity. Phi Kappa Sigma annually awards 30 undergraduate scholarships of \$3,000 each or more.

Local Assistance

Furthermore, we will contact alumni in the area in order to recruit Colony Advisors who will work with the Colony. We also utilize our undergraduate Chapters as much as possible to provide help and guidance to new groups, as a "Big Brother Chapter." We strongly believe that undergraduates learn best from their peers, so we ensure that other local undergraduate Phi Kaps are involved in the Colony process to lend a helping hand, and train Colony members. Local alumni, volunteers, and International Headquarters staff will help facilitate these meetings to ensure that they go smoothly, and answer any questions Colony members may have.

One-on-One Assistance

Our International Office is located in Chester Springs, Pennsylvania. All Chapters and Colonies receive prompt service and support. We also have traveling consultants who can immediately provide guidance to our undergraduates.

International Headquarters Staff

Our staff will visit your Colony at least two times per academic year. This visit will be intensive training to cover all aspects of Colony management. The consultant will work with you to assist in completing "The Challenge" and becoming a Chapter of Phi Kappa Sigma. Our consultant will also provide team building and motivational training with the group, which will increase your individual leadership skills and the success of the Colony.

Expansion Committee

The Expansion Committee's job is to cultivate interest groups into full Colonies, help all interest groups meet pre-colonization criteria, target campuses Phi Kappa Sigma wants to expand to and find or create interest groups on those campuses. Support for these efforts will come through emails, phone calls, and personal on-site visits to work with groups and campuses.

Colony support, while tracked and supported by the Expansion Committee is lead by the International HQ Staff. Phi Kappa Sigma's professional staff is very experienced with bringing colonies through "The Challenge" process of becoming a chapter. More information about "The Challenge" is detailed further in this guide.

“THE COMMITMENT”

Clear Roadmap to Colonization

The process from Interest Group to Colony is one intended to model values and create good recruitment practices. The main goals of this process are to share the potential experience and get as many like minded people involved with the interest group. The goals are meant to be challenging and should be an introduction to the beneficial challenged that await your members as a colony and as a chapter.

Ownership of the Process

Please look over the next page, which is the outline of the goals included within “The Commitment”. This is a minimal timeline and set of goals that your group should adapt and personalize. Create a vision of what type of Phi Kappa Sigma group you want to be and personalize these goals to get you there.

Staff Support

Through this process the Headquarters Staff and Expansion Committee will be there to support your efforts, for training and advice, and to guide the interest group towards colonization.

Recruiting and Colonizing

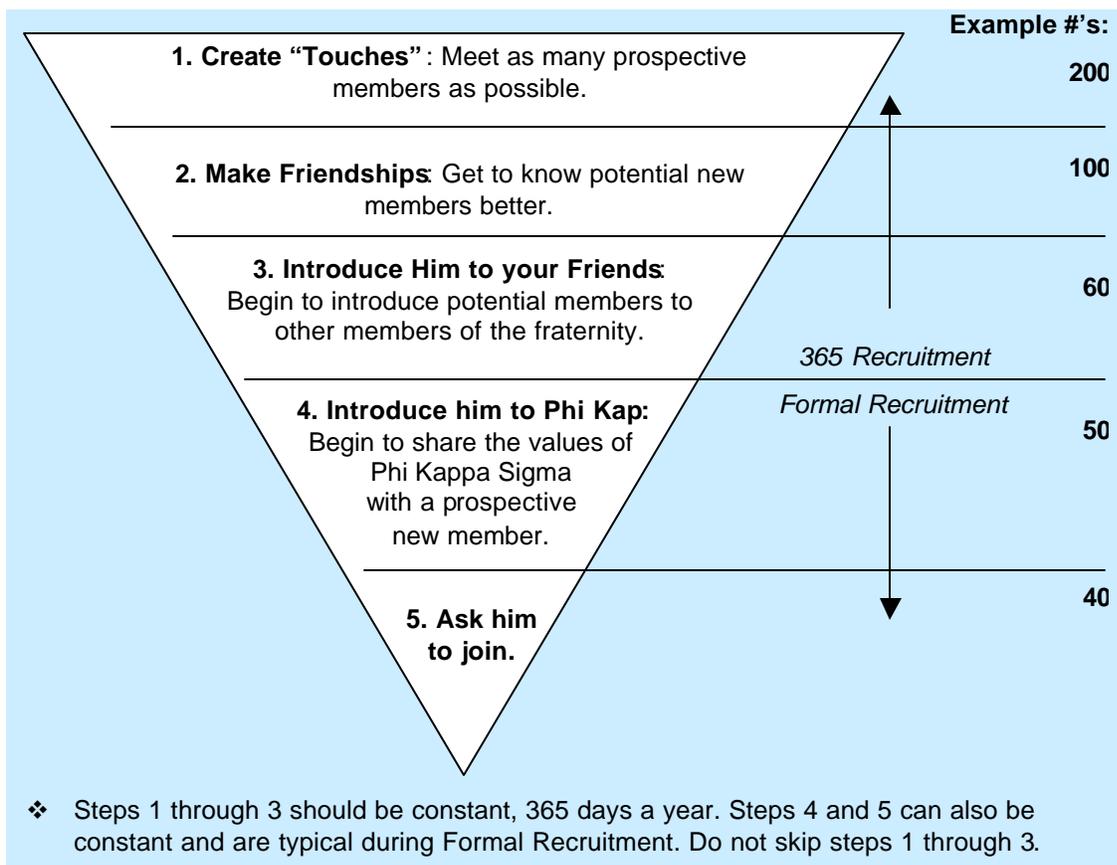
The timeline for “The Commitment “ varies, but the suggested length is one month. The longer you stretch out this process the harder it will become. Use the 5 Step Process to recruiting as your main method to gain interest from other people. Remember to sell the experience and to target the qualities you want in your members. The 5 Step Process is included after the outline of “The Commitment”. Feel free to request a copy of Phi Kappa Sigma’s Recruitment Manual as well, “The Pillars.”

Once you complete “The Commitment” and have met all the pre-colonization criteria (included in this guide) you will be ready to become a Colony and start the companion process to “The Commitment,” known as the “The Challenge.”

Recruiting, the 5 Step Process

Shaping the Funnel – The funnel theory is the visual representation of the 5 Step Process. It shows you that you have to meet many people to ask a few quality ones to join. In order to get 10 guys you need to meet 50. To get 40 you need to meet 200. And keep in mind meeting them needs to be an actual conversation, not a flier or email or a free hamburger.

Throughout the entire year you need to constantly “move” your prospective members down the funnel. This means you have to constantly meet new people. With each step you will lose some people as seen in the example below.



Bid when you are ready – As soon as you have enough prospective new members in line at the bottom of the funnel, go ahead and send them through the new member process. There are 4, 6, and 8 week new member programs available through HQ. If you send through a 5 to 10 member pledge class in an accelerated new member education program during the summer, early in a semester, or late in a semester, they will be a huge help to you in recruiting the next new member class. Do not fall victim to recruiting only when your campus traditionally recruits. Meet people year round and have multiple new member classes and you will be well ahead of the curve on your campus.

As you move through the process you will always lose people as not everyone you meet will become your friend and not all of your friends will want to be apart of the fraternity. The fraternity is just not for some people. The point of the process is that you have to get out there and find a large number of people

in order to get a large number of quality members. The better you get at targeting quality, the less people you will lose through this process.

Part 1 – Top of the funnel – Meeting Him

This part of the funnel theory is where you would meet your prospective member. The key to this part of the funnel is to get your members to be seen by prospective members. Too many chapters think that they can sit back and wait for prospective members to come to them, whereas they really need to go out and meet prospective members who might be interested in joining Phi Kap, but not enough to really participate in a formal recruitment period. You need to see prospective members in a very broad atmosphere (See Section 3). During this stage, you are getting to know the recruits and finding who has the qualities that will make a good brother. You want to meet the person and talk to him. After you talk to him for a few minutes, you should consider him a prospective member. Introduce him to another member if you are unable to decide.

Part 2 – Middle of the funnel – Making Him a Friend

This is the part when you can start to hang out with the prospective member at times other than seeing him around campus. Do what is natural. Hang out in a study group if you met through class. Share your interests.

Part 3 – Bottom of the funnel – Introduce Him to your Friends

Now we move to the bottom of the funnel. After Brothers X, Y and maybe Z know the prospective member (meaning, that if they invite him somewhere it is not awkward) then it is time to move him down to the bottom of the funnel. At this point you are just trying to share the experience of your friends with a prospective member without pressuring him with the idea of your fraternity. Once he has multiple friends in the fraternity he will feel comfortable talking about it, good or bad. Keep things light and make sure you are making an effort to get to know the prospective new members and allowing him to get to know multiple members.

Part 4 – Sieve – Introduce him to Phi Kappa Sigma

Here is where you introduce the prospective new member to the fraternity, to Phi Kappa Sigma. This part of the funnel should be easy if you have followed the first three steps. The prospective member should be comfortable with the fraternity as. At this part of the funnel, you can mention Phi Kap and what it has to offer. More than likely, if you have done a good job with the first three parts, you will not have to worry about this part; it will just come naturally, but do not be afraid to start the discussion. This is the only time you may want to apply a little pressure for him consider the fraternity as an option for him and to answer those tough questions.

Part 5 – Spout – Ask him to join

The overall goals of the funnel theory are the same as any recruitment method, to meet as many prospective new members as possible in order to find the largest number of quality members possible. Do this year round for the ultimate gain.

Pre-Colonization Criteria

- 1.) **Weekly phone and/or email contact with your Expansion Committee contact.** Keeping the lines of communication open is the most critical step regarding the colonization process. It is absolutely imperative for us to be aware of how the group is progressing, and how we can be of assistance during this time period. By keeping in regular contact with the International Headquarters, we can spot problems before they become an issue, give advice, and help the group maximize its potential and become a great asset to Phi Kappa Sigma. While we have every confidence in the men in the group, the Headquarters staff is a valuable resource, and should be used whenever possible. Even if the contact is simply limited to "We're still here, everything's going good, not much else to say", that's fine. We are not asking for expansive, detailed reports, just a quick email or a few minutes on the phone to touch base.
- 2.) **The interest group must consist of at least 25 men, all of whom must have a GPA greater than 2.5.** Scholarship is one of the most important aspects of the Fraternity, and we ask that all colonies strive to recruit members who are performing well academically.
- 3.) **A grade report sheet for all men in the interest group (showing that they are above a 2.5),** endorsed by someone in the school administration (Greek Advisor, Student Affairs office, Dean of Students office, etc.)
- 4.) **Short biographical information of all men in the interest group,** including why they want to start a Fraternity, and why they want to be a part of Phi Kappa Sigma.
- 5.) **A letter from the school administration (Greek Advisor, Student Life office, etc.)** pledging support to the interest group.
- 6.) **Establish a bank account, and save up the amount necessary for colonization (\$250 a man)** Among the items this money covers is the new member fee and the \$170 year-long insurance fee (subject to change) necessary to be an active member of Phi Kappa Sigma. If the group is colonized, this money will be due up front, so you need to be prepared for this. Fees will be pro-rated if necessary, depending on when the group is colonized.
- 7.) **A list of all elected officers** (President, Vice-President, Scholarship Chair, New Member Educator, Secretary, Treasurer, Alumni Chair, Social Chair, and Sergeant-At-Arms (2)), as well as valid contact information (phone and email) for each officer.
- 8.) **The group must hold weekly meetings.** The Secretary must send the minutes to the Expansion Committee or Staff contact each week.
- 9.) **Meet with the Inter-Fraternity Council Greek Advisor, to discuss what needs to be done to bring a new Fraternity to the campus.** Recognition from the school is necessary for eventual chartering, so please begin working with the Greek Advisor to see what needs to be done from the school's perspective, and start building a relationship with them.
- 10.) **Fill out the Expansion Opportunity (EO) form (provided by the Expansion Committee/International Headquarters).** This form is to give us a detailed view of the group, the campus, and the opportunity in general, and allow us to make an informed decision regarding colonization. If any help is needed in completing the form, please do not hesitate to contact the International Headquarters so we can assist.

Colony Induction Ceremony

Alumnus - "In view of the fact that you (insert name or names of the men being pledged into the Colony) have made known to the assembled witnesses, members of the Phi Kappa Sigma Fraternity, your intention of joining this Fraternity as soon as circumstances shall honorably and legitimately permit of your initiation into the same, it is only fit and proper that so important a resolution should be solemnized by a formal avowal of this, your purpose."

Alumnus - "Do you affirm that you are in no way obligated to any college fraternity of similar nature to the Phi Kappa Sigma Fraternity?"

Answer - "I do." (If the candidate acknowledges membership in another fraternity of similar nature, he must not be pledged and should leave the room.)

Alumnus - "Do you solemnly promise never to disclose or divulge in any manner whatsoever, any secrets which may be made known to you in your association with the members of the Fraternity?"

Answer - "I do."

Alumnus - "Do you promise never to join any other college fraternity similar to Phi Kappa Sigma unless formally released from this, your pledge?"

Answer - "I do."

Alumnus - "Do you promise to do all in your power as a pledged member of this fraternity?"

Answer - "I do."

Alumnus - "You will now consider yourself a new Member of the (insert name) Colony of Phi Kappa Sigma Fraternity."

Alumni - "So let it be."

Alumnus - "The New Members will please form a line to receive congratulatory hand shakes as the members pass along the line."

“THE CHALLENGE”

Clear Roadmap to Chartering

The process from Colony to Chapter is one focused on developing the skills needed for long-term Chapter stability. The main focus of this process is fraternity management skills, create financial stability, and further develop recruitment skills. The involvement of an Alumni advisory Board also begins with “The Challenge.”

Ownership of the Process

Please look over the next three pages, which is the outline of the goals included within “The Challenge”. This is a minimal timeline and set of goals that your group should adapt and personalize. Create a vision of what type of Phi Kappa Sigma Chapter you want to be and personalize these goals to get you there.

Staff and Alumni Support

Throughout “The Challenge” monthly conference calls and consistent communication with our Headquarters Staff will ensure consistent advice and guidance through the whole process. An Alumni Advisory Board will also be formed during this process. The focus of the board will be to give more knowledgeable localized support to the group.

Other Resources

Look to the “Other Resources” section within this guide as well as the “Chapter Operations CD” (available through the Headquarters) for more resources and guides.

Requirements

Phase

Fulfill the below requirements to become a Phase 2 Colony

Membership

1. 35 Total Members or 90% of Avg. Fraternity Size
2. Collect/Update Member Biographies (Name, home town, age, major, why he wants to be a member of Phi Kappa Sigma)

Chapter Management

1. Contact with International Headquarters on a weekly basis (Phone or Email).
2. Colony visit to a Phi Kap Chapter
3. Create Colony By-Laws
4. Have each member sign a Membership Agreement
5. Weekly meeting with Greek Advisor
6. Create Colony Calendar (meetings/recruitment activities/events/etc)
7. Update Roster (Name, Address, Phone Number, Email, Class Rank, and Office Held).
8. Weekly Colony Meetings:
 - I. Disseminating Information from International Headquarters
 - II. Recruitment & Activity Planning
 - III. Completing Documentation
 - IV. Set Officer Goals (who is in charge of what)
 - VI. Budget Approval w/ Dues Structure built into budget (based on calendar of events)

Financial Management

1. Work with HQ to create a Colony Budget
2. Complete Employer Identification Number (EIN) application and submit to the IRS
3. Create Colony Checking Account at local bank (EIN needed for this)
4. Create Colony Savings Account at local bank (EIN needed for this)
5. Work with HQ to create a Colony Budget
6. Send into HQ Monthly Financial Statements & Income Statements
7. Establish an Account with a Billing & Collections Service (ie, Omega Financial, APH, or Greek Bill)

Deliverables

Date Completed

- | Deliverables | Date Completed |
|--|----------------|
| Contact w/ International HQ Staff once a week (phone or email) | |
| Send Completed Roster Update to staff@pks.org | |
| Visit to Phi Kap Chapter | |
| Membership Agreements signed w/ copies sent to Phi Kap HQ | |
| Send Colony Officer Goals to Phi Kap HQ staff@pks.org | |
| Send Colony Calendar to Phi Kap HQ | |
| Send Approved Colony Budget to staff@pks.org | |
| Send Financial Statements & Income Statements to staff@pks.org | |
| Send Meeting Minutes (Notes of what is discussed at meetings) to staff@pks.org | |

1

Requirements

Phase

Fulfill the below requirements to become a Phase 3 Colony

Membership (Recruitment & Officers)

1. 45 Total Members or 110% Avg Fraternity Size
2. Collect/Update Member Biographies (Name, hometown, age, major, why he wants to be a member of Phi Kappa Sigma)
3. Establish Scholastic Program (Making the Grade & Grade Point League)
4. Start New Member Education Program (Pillars Weeks 1-4)

Chapter Management

1. Contact with International Headquarters on a weekly basis (Phone or Email).
2. Update Roster (Name, Address, Phone Number, Email, Class Rank, and Office Held).
3. Hold a Social Event with another Greek Organization
4. Hold a Community Service Event
5. Hold a Fundraising Event
6. Weekly meeting with Greek Advisor
7. Weekly Group Meetings
 - I. Disseminating Information from International Headquarters
 - II. Recruitment & Activity Planning
 - III. Completing Documentation
 - IV. Set Officer Goals (who is in charge of what)

Financial Management

1. Increase Savings/Reserve Account to at least \$350
2. Create Monthly Financial Reports (Financial Statements & Income Statement)

Deliverables

Date Completed

Contact w/ International HQ Staff once a week (phone or email)	
Send Completed Roster Update to staff@pks.org	
Send Financial Statements & Income Statements to staff@pks.org	
Send Meeting Minutes (Notes of what is discussed at meetings) to staff@pks.org	
Hold a Social Event with another Greek Organization	
Hold a Community Service Event	
Hold a Fundraising Event	

Requirements

Phase

Meet these requirements below to become a Chapter of Phi Kappa Sigma***

3

Membership

1. Finish Member Biographies (Name, home town, age, major, why he wants to be a member of Phi Kappa
2. Continue Scholastic Program (Making the Grade & Grade Point League)
3. Continue New Member Education Program (Pillars Weeks 4-8)

Chapter Management

1. Contact with International Headquarters on a weekly basis (Phone or Email).
2. Update Roster (Name, Address, Phone Number, Email, Class Rank, and Office Held).
3. Collect grade reports from members (Greek Life Office may assist you with this).
4. Hold an Alumni Event and Parent Event
5. Hold a Brotherhood Event
6. Hold a Fundraising Event
7. Complete Colony Petition (Letter from Colony, Roster, By-Laws, Budget, History of School, History of
8. Weekly Group Meetings
 - I. Disseminating Information from International Headquarters
 - II. Recruitment & Activity Planning
 - III. Completing Documentation
 - IV. Set Officer Goals (who is in charge of what)

Financial Management

1. Increase Savings/Reserve Account to at least \$1000
2. Create Monthly Financial Reports (Financial Statements & Income Statement)

Deliverables

Date Completed

Deliverables	Date Completed
Contact w/ International HQ Staff once a week (phone or email)	
Send Meeting Minutes (Notes of what is discussed at meetings) to staff@pks.org	
Send Financial Statements & Income Statements to staff@pks.org	
Send Completed Grade Report to International Headquarters	
Send Completed Roster Update to staff@pks.org	
Send Completed Colony Petition and send draft to staff@pks.org	
Fundraising Event	
Alumni/Parent Event	
Brotherhood Event	

* Chapter Status is contingent upon receipt of all deliverables to Headquarters followed by Executive

** Colony must have a cumulative GPA 1/10th higher than the all men's avg. Each member of the colony should also be part of or in the process of being in at least other club or organization.

*** The colony must have their scholastic program approved by HQ or be using the Phi Kappa Sigma scholastic program.

Colony Meeting Format

Alpha: *(3 raps, all rise)* “The meeting will now come to order. Please give your attention while the Beta recites the Objects.”

Beta: The Objects of this Fraternity shall be the promotion of good fellowship and the cultivation of the social virtues among its members; the protection of the just rights and the advancement of the best interests, present and future, individual and collective, of all those who shall be associated together as members of this Fraternity; the encouragement of good scholarship and breadth of training for its members; and cooperation in the educational and cultural programs of institutions of higher education in which Chapters are located.

Alpha: “I now declare this meeting of *(insert name)* Colony of Phi Kappa Sigma officially opens for business.” *(1 rap, all sit)*

Alpha: “The first order of business shall be the roll call.” *(Sigma calls roll)*

Alpha: “The second order of business shall be the reading of the minutes.” *(Sigma reads minutes)*
(Motion should be made to approve minutes as read or as amended.)

Alpha: “The Sigma shall now read a selection from The Constitution and Acts or Bylaws.”

Alpha: “The next order of business shall be reports of the officers and committees.”

(Beta, Pi, Iota, Thetas, Tau, Psi, Sigma, Fundraiser and Community Service give their reports.)

Alpha: “Is there any old or unfinished business?”

Alpha: “Do we have any new business?”

(Introduce guests and let them speak.)

Alpha: “Is there anything further to be brought before the assembled Colony members?” *(Short Pause)*
“Has anyone anything further to say for the good of the Colony?”

Alpha: “We will now proceed to close. The chair will entertain a motion for adjournment.”

(A motion for adjournment by a Colony member should be made and seconded.)

Alpha: “Please rise will the Beta recites the divine blessing.” *(3 raps, all rise)*

Beta: Recites divine blessing

Alpha: “I hereby declare this meeting of the *(insert name)* Colony of Phi Kappa Sigma officially closed until its next regular meeting to be held *(insert date, time and location)*. *(1 rap)*

The Pillars: New Member Education Program

While the Colony is striving to meet “The Challenge,” they will also be learning about Phi Kappa Sigma, and going through our new member education process, called “The Pillars.” Our new member education process is an 8-week program that all our Chapters and Colonies are required to use in training new members. Additional 4 and 6 week versions are available when needed.

The Colony Iota is in charge of becoming familiar with “The Pillars” and then administering it to the rest of the Colony. The Colony Advisor, International Headquarters, or Big Brother Chapter can also help with this task, as the Iota will be trying to administer a program he is just now (or only recently) learned.

The Colony should ensure that all members are equal and being educated as such. No Colony members should be treated as “pledges” or somehow unworthy of membership. “The Pillars” is intended to educate new members so that everyone is familiar with Phi Kappa Sigma equally.

The sections regarding initiation and post-initiation education will not become relevant to the Colony until it is a chartered Chapter.

You can obtain “The Pillars” by contacting the International Headquarters, or by going to <http://www.pks.org>. A general timeline of “The Pillars” is below:

Meeting One: New Member Orientation and Risk Management

Meeting Two: American Fraternity and Phi Kappa Sigma Origins

Meeting Three: The Expectations, Objectives, and Core Values of Phi Kappa Sigma

- Objective: Financial Commitment
- Value: Responsibility

Meeting Four: Historical Highlights

- Objective: Scholarship
- Value: Knowledge and Wisdom

Meeting Five: The International Fraternity

- Objective: Personal Conduct
- Value: Respect

Meeting Six: Undergraduate Chapter Origins

- Objective: Fraternity
- Value: Trust and Honor

Meeting Seven: Undergraduate Chapter Operations

- Objective: College/University Involvement
- Value: Integrity

Meeting Eight: Putting It All Together

Charter Petition Requirements

Once the Challenge is completed a colony must submit a formal petition for chapter status. This petition is then reviewed and voted on by the Executive Board and recommendations are given to all active chapters for the chapter vote.

The petition must include the following:

- Hard bound cover
- Cover Page that represents the colony
- Table of Contents
- Letter signed by all Colony members to Executive Board Requesting Chapter Installation
- Statement of Values
- Statement of Vision
- Colony Goals
- Current Officer Roster
- Membership Roster
- Member Biographical Sketches
- Proposed Chapter By-Laws
- University History
- Colony History
- University Greek System Overview
 - List facts and figures on all fraternities and sororities
 - Short history of campus' Greek Life
- Member Education Program Summary
- Philanthropy and Fundraising Activities/Events
- Financial Overview
 - Budget
 - Current Bank Statement
 - Proof of savings and third party financial service
- GPA and Scholarship Statements of Proof
 - Average campus GPA
 - Each members GPA
- Selected Candid Moments/Events
- Letters of Recommendation

OTHER RESOURCES

Phi Kappa Sigma International Fraternity provides all Policy and Procedures, Chapter Operations, and Information and Resource Files to Chapters, Colonies, and Interests Groups through two simple resource, our website at www.PKS.org and on the Chapter Operations CD

Phi Kappa Sigma's International Headquarters is always available to assist and advice chapters whenever the need exist. Our staff is committed to supporting the needs of our Chapters and Colonies. To contact the International Headquarters please feel free to use the following contact information, all of which is included on the website:

Phone - 610-469-3282
Toll Free - 888-PKS-INTL
Fax - 610-469-3286
E-Mail - staff@pks.org
Website - www.PKS.org

Documents to Review

(all of the following is contained on the Chapter Operations CD):

Information and Policies – As a colony you should go through each of these documents carefully, acquainting yourself with the information and policies of the International Fraternity. Dues, Risk Management, Insurance and all important Policies, Procedures, and Information is available for all chapters and colonies to utilize.

Forms and Reports – Utilizing the forms, reports, and templates provided for chapters and colonies makes communication with the International Headquarters and organization of operations much easier. We suggest that all chapters and colonies utilize these documents for their specific needs.

Manuals – The Phi Kappa Sigma Manual Library serves as extensive set of guides for chapters and colonies to utilize. Every subject a chapter might need information or assistance with is contained within one of the various manuals.

Videos – The Recruitment and Values workshops from the 2004 Men of Honor program are available for chapters and colonies to utilize for their benefit.

Sample Bylaws

An example set of Bylaws is available on the Chapter Operations CD and website. It offers suggestions on organization and efficiency of Chapter operations. It may be used as a guideline and not adopted verbatim. In addition, the International Headquarters keeps copies of all Chapter Bylaws on file – we can provide you with multiple examples of Bylaws from other Chapters.

Suggestion: Once the Bylaws are adopted, they should be printed on only one side of paper, double spaced; the opposite side of paper can be used to enter amendments or changes, and the double spacing provides room between the lines for noting interpretations.