



# THE PHI MU DELTA FRATERNITY



## VOLUNTEER HANDBOOK

[WWW.PHIMUDELTA.ORG](http://WWW.PHIMUDELTA.ORG)



*Dear Volunteer,*

Congratulations on accepting a volunteer position with the Phi Mu Delta Fraternity! The National Fraternity is honored and excited to work with great volunteers that are dedicated to working with the undergraduate members throughout their collegiate experience.

The volunteers are the backbone of Phi Mu Delta Fraternity. This organization would not be successful without dedicated, hard-working volunteers! As a volunteer, you will be a role model, mentor, educator, and support network for the members and groups as they grow.

This handbook highlights many of the important components to being a volunteer for the National Fraternity. Information about the national organization, undergraduate chapters, governing structures, and resources are all provided but this is not an exhaustive manual.

Phi Mu Delta Fraternity looks forward to working with you and appreciates the time and dedication you put forth for the members!

Sincerely,

Director of Chapter Services & Growth



"We don't always know whose lives we touched and made better for having cared, because actions can sometimes have unforeseen ramifications. What is important is that you do care and you act."

-Charlotte Lunsford



# Table of Contents

*The Fraternity*

3

*The Members*

36

*Volunteers*

65

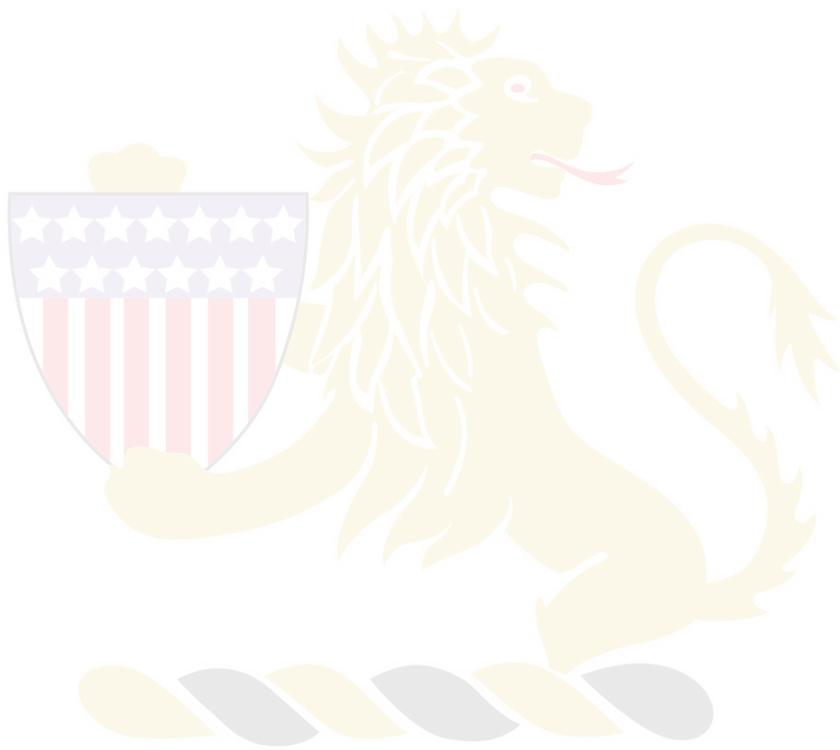
*Resources*

80

*Appendix*

86

- 4 General Information
- 6 National Support
- 7 National Constitution + Bylaws
- 27 Policies + Position Statements
- 30 National Programs
- 33 Strategic Plan
- 34 How to Identify an Advisor
  
- 37 Membership Information
- 41 Governing Structure
- 42 Risk Management
- 51 ENGAGE Program
- 53 Chapter Management
- 60 Budgeting Basics
- 62 Chapter Meetings
  
- 66 Student Development Theory
- 72 Chapter Advisors
- 76 District Governors
- 77 National Council Officers
  
- 81 National Associations
- 82 Directory
- 83 References
- 84 Resources
  
- 87 Online Supports
- 91 Sample Documents



# *The Fraternity*





# General Information

## Mission

To provide a positive fraternity experience for today's college man, encouraging high personal standards, morally, mentally, and spiritually, and, to help its members live the ideals of our founders: democracy, brotherhood and service.

## Vision

To redefine fraternity through cultivating and curating a culture of lifelong civic engagement and fellowship.



## Fraternity Ideals

- BROTHERHOOD** The relationship between brothers that is linked by common values, interests, and goals.
- SERVICE** The act of doing something for the welfare of others.
- DEMOCRACY** Each member has a voice and is treated with dignity, respect, and equality. That all decisions are made with justice in mind and that we do what is just at all times.

## The Founders' Creed

I believe in **Democracy**... a democracy characterized by the practice of justice in every relations of life. I hold that justice is the foremost principle to be considered in making my decisions

as a voting member of Phi Mu Delta, the student body, and as a citizen of the United States. I believe in that broad conception of democracy which seeks freedom of opportunity, and recognizes no color, race, creed, or position.

I Believe in **Service**... service to the college; service to every group organized for the common good; service to the individual. I believe in service defined in the terms of voluntary sacrifice for the welfare of those with whom I come in contact.

I Believe in **Brotherhood**... Brotherhood that reaches beyond the limits of Phi Mu Delta and welcomes every man as my Brother. I believe in the intrinsic worth of the man at my side, and in his ability to make good and justify my faith in him.

I hold these beliefs as my profound conviction, and I pledge my fellow men to live up to them to the best of my ability.

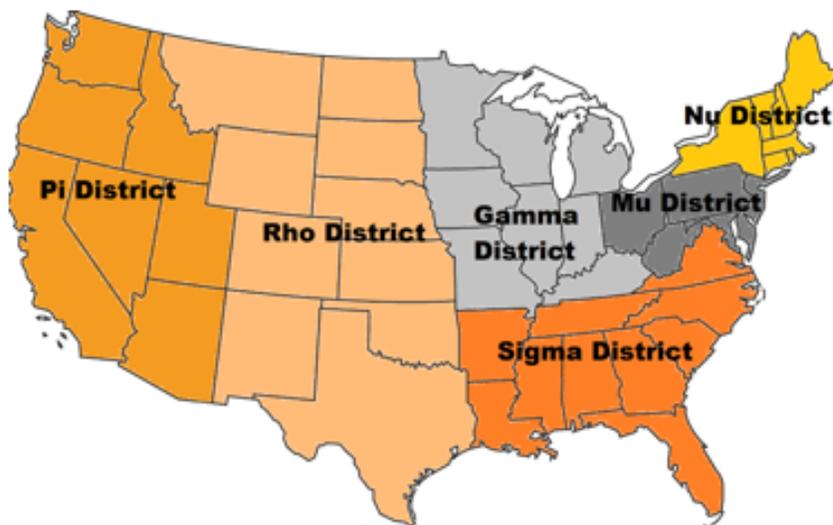
## *Fast Facts*

PHILANTHROPY	Saint Jude Children's Research Hospital
COLORS	Princeton Orange, Black and White
FLOWER	The Jonquil
PATRON SAINT	Abraham Lincoln
MASCOT	Raccoon or Lion



## *Undergraduate Chapters*

NAME	INSTITUTION	INSTALLED
Nu Beta	University of New Hampshire	March 1, 1918
Nu Gamma	University of Vermont	March 1, 1918
Mu Alpha	Susquehanna University	December 20, 1924
Mu Beta	Ohio Northern University	April 10, 1926
Nu Eta	University of Rhode Island	February 23, 1929
Nu Theta	Rensselaer Polytechnic Institute	May 4, 1929
Mu Epsilon	Pennsylvania State University	October 11, 1930
Nu Xi	University of Southern Maine	December 8, 1967
Mu Zeta	Lock Haven University	April 12, 1969
Mu Theta	Indiana University of PA	August 8, 1998
Mu Xi	Pennsylvania College of Technology	April 25, 2003
Nu Pi	Plattsburgh State University	April 28, 2007
Mu Omicron	Frostburg State University	April 15, 2009
Sigma Alpha	Longwood University	April 25, 2013
Mu Rho	Shawnee State University	March 13, 2016
Mu Sigma	Rutgers University – New Brunswick	October 22, 2016
Mu Tau	Rutgers University - Camden	October 22, 2016
Nu Eta Colony	University of Rhode Island	
Nu Rho Colony	Rhode Island College	
Mu Upsilon Colony	Robert Morris University	
Mu Phi Colony	Wright State University	





# National Support

## *Executive Director*

The Executive Director manages the daily affairs of the fraternity through working to hire and supervise staff, serving as a representative of the National Fraternity, acting as a liaison between the National Fraternity and host institutions, cultivating alumni support within the fraternity, and organizing chapter visits with the National Office. The Executive Director also serves as an ex-officio member of the National Council and the nominations committee.

## *Director of Chapter Services & Growth*

The Director of Chapter Services and Growth supports the undergraduate chapters and colonies and on the growth efforts of the National Fraternity by developing the educational programming for the National Fraternity, visiting chapters/colonies during the academic year, providing leadership training, recruitment training, assistance and educational programming to chapters/colonies. In addition, the Director oversees the expansion efforts for the National Fraternity, including recruiting and conducting expansion visits with newly-formed groups, ensuring the health and stability of chapters, assisting in identifying, recruiting, and training Chapter Advisory Board members and District Governors, and creating and implementing all regional and national leadership conferences.

## *Alumni Associations / Housing Corporations*



Alumni Associations are formed in order to provide a support and assistance role with the undergraduate chapter, as well as, maintain social contact with the alumni from a particular chapter. Alumni Associations have an executive board which plans and finances educational programming for the benefit of the chapter or social events for the alumni. In addition, these boards help raise money for the chapter in order to finance educational endeavors

and scholarships. Housing Corporations, often referred to as alumni control boards, are in control of all property owned and maintained by the local chapters of the fraternity. These boards are incorporated through the state and operate with a board of directors. They work closely with the Chapter President, Treasurer and House Manager to ensure that the property is well maintained and all bills are paid in a timely manner.



# National Constitution

## **PREAMBLE**

For the promulgation of the noble purposes of brotherhood which caused The Phi Mu Delta Fraternity to be founded, and which were enunciated as follows in the preamble to the constitution, adopted in 1918, we do hereby adopt this constitution:

"We the representatives of fraternal organizations of the University of Vermont, New Hampshire State College, and Connecticut Agricultural College, believing that there is a need of a democratic fraternal organization both for the college and for the individual, and in order to secure a closer brotherhood and to give permanence to a central organization, do hereby form and establish The National Fraternity of Phi Mu Delta."

## **ARTICLE I. NAME**

Section 1. The name of this National fraternal organization shall be "The Phi Mu Delta Fraternity."

## **ARTICLE II. PRINCIPLE AND PURPOSE**

Section 1. The principle of the fraternity shall be that indicated by the Greek phrase for which the name stands.

Section 2. The purpose of the fraternity shall be service to the college, to the fraternity, and to the individual.

## **ARTICLE III. MEMBERSHIP**

Section 1. Phi Mu Delta affirms its founding values that no man shall be denied membership on the basis of color, race, creed, position, disability or sexual orientation.

Section 2. Character, ability, and willingness to support the fraternity and its principles shall be the basis of eligibility for membership.

Section 3. No man belonging to another National fraternity shall be admitted to membership, and no member of The Phi Mu Delta Fraternity shall join any other National fraternity. As used in this provision, the term "National fraternity" shall not be interpreted to include honorary and professional fraternities.

Section 4. Members shall be initiated according to the constitution, and shall consist of two classes: collegiate and alumnus.

Par. 1. Collegiate members shall be all those engaged in collegiate academic studies at institutions of higher learning where The Phi Mu Delta Fraternity has an established chapter who has received an invitation to join based on said chapter's by-laws.

Par. 1a. A Collegiate member who transfers to a campus where no chapter exists shall retain his membership in the chapter in which he was initiated.

Par 1b. Upon graduation from undergraduate studies a collegiate member will automatically move to alumni status. If the member is continuing in graduate studies he will have the option to continue as a colligate member by notifying the National Office.

Par. 2. Alumni members shall be all former collegiate members no longer pursuing collegiate studies.

Par. 2a. The father or legal male guardian of an initiated collegiate member may be invited to join the Fraternity and is immediately given alumni status upon initiation as long as his membership does not violate Article III, Section 3.

Par. 3. Honorary membership may be extended to any person in recognition of outstanding achievement on behalf of the fraternity. Such membership shall require a two- thirds affirmative vote of the National Council.

Par 4. Phi Mu Delta does not recognize inactive collegiate status. Members who choose to not be active must submit resignation paperwork to the National Office and their local chapter.

#### **ARTICLE IV. ORGANIZATION**

Section 1. The Phi Mu Delta fraternity shall be composed of local organizations established at institutions of undergraduate standing, coordinated by a National organization consisting of the National Conclave, the National Council, the National executive committee, and the National standing committees established by this constitution.

Section 2. The National organization shall have, as provided in this constitution, the power to control the admission and withdrawal of local organizations, the structure of the local organizations, the method of acquiring new members, the admission, honorable dismissal, expulsion of members, the initiation and other rituals, and the use of the insignia. It shall have, as provided in this constitution, general supervisory authority over the finances of the local organizations, and shall carry on relations with other (Inter) National fraternal organizations.

Section 3. All powers not expressly delegated by this constitution to the National organization are reserved to the local organizations through their by-laws.

## **ARTICLE V. LOCAL ORGANIZATIONS**

Section 1. Local organizations may be established at any institutions of undergraduate standing which have no regulations prohibiting fraternal organizations.

Section 2. Each local organization shall consist of a collegiate chapter composed of undergraduate and graduate student members.

Par. 1. Chapters with houses should have a separate Alumni Corporation Control Board (a.k.a House Corporation) to perform landlord related functions for the property. Such Alumni Control Boards are chartered entities within the National Fraternity.

Par 2. Alumni from any chapter may form an alumni association in accordance with the policies of the National Fraternity. Such alumni associations are chartered entities within the National Fraternity.

Section 3. Each collegiate chapter and alumni association shall be governed by a constitution and by-laws duly enacted by it and reviewed administratively by the National Office. The National Office shall be notified of all amendments. Local constitutions must be in accordance with the National Constitution.

Section 4. The local organizations comprising the fraternity shall be divided into six districts:

Par. 1. Nu district shall include Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, and New York.

Par. 2. Mu district shall include Pennsylvania, New Jersey, Delaware, Maryland, Ohio, West Virginia and Washington DC.

Par.3. Gamma district shall include Indiana, Illinois, Kentucky, Michigan, Wisconsin, Iowa, Minnesota, and Missouri.

Par. 4. Sigma district shall include Virginia, North Carolina, South Carolina, Georgia, Florida, Alabama, Mississippi, Tennessee, Arkansas, and Louisiana.

Par. 5. Rho district shall include North Dakota, South Dakota, Kansas, Nebraska, Montana, Wyoming, Colorado, New Mexico, Oklahoma, and Texas.

Par. 6. Pi district shall include Alaska, Washington, Oregon, California, Idaho, Nevada, Utah, Arizona, and Hawaii.

Section 5. Each local organization shall be designated by no more than three Greek letters, the first of which indicates the district.

## **ARTICLE VI. THE NATIONAL ORGANIZATION - THE NATIONAL CONCLAVE**

Section 1. The National Conclave shall consist of two voting delegates from each Collegiate chapter and colony in good standing, one voting delegate from each chapter Alumni Association in good standing, one voting delegate from each Alumni House Corporation in good standing, Past National Presidents, and each member of the National Council.

Section 2. No Collegiate chapter, House Corporation or Chapter Alumni Association which owes an unfunded obligation to the National organization shall be permitted a vote at the National Conclave.

Section 3. Each voting delegate shall be entitled to one vote. No one shall be entitled to more than one vote, and voting by proxy shall not be permitted. Past National Presidents must be properly credentialed and in good standing with the Fraternity in order to vote.

Section 4. Each Collegiate chapter, House Corporation and chapter alumni association may have as many non-voting representatives present as it desires.

Par. 1. Collegiate chapters are required to send at least two voting delegates and one alternate. Chapter Alumni Associations and House Corporations are required to send at least one delegate to remain in good standing.

Section 5. Meetings of the National Conclave shall be held at such times and places as may be specified by the National Council. In no case shall the interval between meetings exceed two years.

Par. 1. The National Conclave shall be held on even-numbered years, whereas, the Sapphire Leadership Academy shall be held during odd-numbered years.

Section 6. All powers delegated by this constitution to the National organization shall be invested in the National Conclave.

Par. 1. The National Conclave may by a three-quarters vote amend this constitution. It may also by a three-quarters vote admit, expel, withdraw the charter of, or readmit a local chapter, subject to the conditions laid down by this constitution.

Par. 2. The National Conclave shall, by a majority vote, elect the National Council and may by a three-quarters vote remove any member of the National Council, subject to the provisions of this constitution.

Par. 3. The National Conclave shall determine installation fees and other expenses incidental to the installation of new collegiate organizations and National membership fees payable by collegiate members, but may delegate any or all of these powers to the National Council.

Par. 4. The National Conclave may assign to the National Council, the National executive committee, or the National standing committees any duties not specifically delegated to any individual or group by this constitution.

Par. 5. The National Conclave may review and ratify or disallow the acts of the National Council during the interval since the previous meeting of the National Conclave.

## **ARTICLE VII. THE NATIONAL COUNCIL**

Section 1. The National Council shall consist of up to nine members: the National President, the National Vice-President of Membership, the National Vice-President of Finance, the National Secretary, two collegiate representatives, two Councilmen-at-large, and the Executive Director, who shall serve as an Ex-Officio Member of the National Council.

Section 2. The National Council shall be open to nominations during the interval between Conclaves. A Chair will be appointed by the National President to oversee the nominating committee, which will consist of worthy alumni and collegiate members in good standing selected by the Nominating Chair. The nominating committee will solicit nominations and applications and develop a slate to be approved by the Conclave. In addition, nominations may be received from the floor at Conclave.

Par. 1. Any alumnus in good standing is eligible for nomination

Par. 2. At each Conclave and Sapphire Leadership Academy, the Collegiate members present shall caucus and nominate their peers to run for the office of Collegiate Representative to National Council. Two representatives shall be elected to National Council. The term of office shall be one year. If the representative is unable to fulfill his one-year term or his obligations, a replacement will be appointed by the President and ratified by the National Council.

Par. 3. All members of National Council have equal voting rights, with the exception of the Executive Director. In case of a tie, the President shall cast the deciding vote.

Par. 4 The term of a National Council member is 2 years and their total length of service shall not exceed 10 consecutive years with the exception of the Executive Director. Their term will expire after the meeting of the Conclave.

Par. 5 If for any reason there is a vacancy on the National Council, a replacement will be appointed by President and ratified by the National Council.

Section 3. At the first meeting following its election, the National Council shall elect from among its members the National President, National Vice-President of Membership, National Vice-President of Finance, and National Secretary. The Collegiate representatives of the National Council shall not be eligible for executive office.

Section 4. The National Council shall meet upon the call of the National President at such times and places as he may designate. Special meetings shall be called by the National President upon petition of at least five members of the National Council. A quorum shall constitute one-half the number of members voted to National Council plus one. Where a meeting of the National Council is impractical, the Council may vote and meet by phone, email, mail or by other technological means and will be canvassed by the National Secretary, with the voting time on any question being fifteen(15) calendar days from the date of the postmark on the envelope (or the date/time stamp on the electronic mail message) in which the question to be voted upon is mailed, provided, however, that a quorum of votes are received within that time.

**Section 5. During the interval between meetings of the National Conclave, the National Council shall exercise all powers delegated by this constitution to the National organization and not specifically delegated to any other individual or group.**

**Par. 1. The National Council shall be empowered to make such appointments as it shall consider necessary for carrying on the administrative work of the fraternity and shall provide proper compensation for services rendered. It shall also be empowered to remove such appointees at any time.**

**Par. 2. The National Council shall be empowered to authorize, by a three-quarters vote, the National Vice-President of Finance to lend available funds, or use as collateral available funds of the fraternity, except as limited by the by-laws.**

**Par. 3. The National Council shall review and ratify or disallow the acts of the National executive committee during the interval since the previous meeting of the National Council.**

**Par. 4. The National Council may recommend, by a three-quarters vote of its members, the admission, expulsion, suspension, charter withdrawal, or re-admission of a local chapter.**

**Par. 5. The National Council shall be empowered to fill, by majority vote of its members, any vacancy in its own membership until the next Conclave.**

**Par. 6. The National Council, by a three-quarters vote, may recommend that a local chapter or alumni association remove one of its members for the good of the fraternity. Such removal shall be effected only by three-quarters vote of the organization involved. Provided, however, that should the local organization fail to act within thirty (30) days, the recommendation shall be deemed ratified.**

**Section 6. No National Council member, with the exception of the Executive Director, shall receive compensation for his services, but may be reimbursed by the fraternity for reasonable expenses incurred in its behalf.**



## **ARTICLE VIII. THE NATIONAL OFFICERS**

**Section 1. The National President.** It shall be the duty of the National President to preside at all meetings of the National Conclave, the National Council, and the National executive committee. He shall call all meetings of the National Council and the National executive committee as provided in this constitution. He shall be an ex-officio member of all National committees. He shall sign all charters, membership certificates, and scholarship scrolls. He shall rule on all questions of law and order in meetings of the National Conclave, the National Council, and the National executive committee. He shall appoint, with the concurrence of the National Council, all National standing committees for terms of two years concurrent with the term of the National Council, and, subject to the provisions of this constitution, any temporary committees which he considers necessary, and the editor of the Triangle of Phi Mu Delta. He shall perform all duties incidental and necessary to his office. He shall preside at all installations of new chapters, but may delegate this duty to another member of the fraternity, if necessary. Upon all National Council and National executive committee matters, he shall have the privilege of voting.

**Par. 1.** The National President, with the advice and consent of National Council, shall be empowered to sign for the Phi Mu Delta Corporation and enter into legal contracts and be authorized to have the use of the corporate seal.

**Section 2. The National Vice-President of Membership.** The National Vice-President of Membership shall be a member of the National executive committee and perform all of the duties of the National presidency in the event of the death or resignation of the National President. The National Vice-President of Membership is also responsible for the National Standards and Ethics Board and supervision over all standing and ad hoc committees

**Section 3. The National Vice-President of Finance.** The National Vice-President of Finance shall be chairman of the National finance committee and a member of the National executive committee. He shall, in cooperation with the Executive Director, review the financial reports of the Collegiate chapters and chapter alumni associations and assist them in financial matters. He shall review and approve all financial reports of the Executive Director periodically for accuracy and completeness, He oversee all expenses of the National Office. He will approve all tax filings He shall carry out all duties specifically delegated to him in this constitution and by-laws. He shall establish the annual budget in conjunction with the Executive Director and Finance Committee.

**Section 4. The National Secretary.** The National Secretary shall be the custodian of the constitution, by-laws, rituals, records, and archives of the fraternity. He shall keep an accurate record of the proceedings of meetings of the National Conclave, the National Council, and the National executive committee. He shall sign all charters and membership certificates.

**Section 5.** The remaining Councilmen at-large and the Collegiate Councilmen will have their duties assigned by the National President.

Section 6. The Executive Director. The position of the executive director serves at the will and pleasure of the National executive committee. The duties of the executive director shall be to manage the daily affairs of the Fraternity, hire and supervise staff, serve as a representative of the National fraternity, act as a liaison between the National fraternity and host institutions, cultivate alumni support within the fraternity, and organize chapter visits with the National Office. The executive director shall serve as an ex-officio member of the National Council, the Conclave and the nominations committee. He shall also represent the fraternity within the Fraternity Executive's Association, The North-American Interfraternity Conference, and the Association of Fraternity Advisors. The executive director shall also provide training and support to the Chapters and colonies, House Corporations and Alumni Associations. He shall maintain the accounts of the fraternity, said accounts being subject to audit at the direction of the National finance committee or of the National Council. He shall present a complete accounting of the finances to the Vice President of Finance.

Par. 1. The Executive Director shall report to the National Executive Board via the National President and shall receive an annual evaluation from the National executive board.

Par 2. The Executive Director, with the advice and consent of National Council, shall be empowered to sign for the Phi Mu Delta Corporation and enter into legal contracts and be authorized to have the use of the corporate seal.

## **ARTICLE VIII. THE NATIONAL OFFICERS**

Section 1. The National executive committee shall consist of the National President, the National Vice-President of Membership, the National Vice-President of Finance, the National Secretary, and one of the Collegiate Representatives. The National President shall have the option of appointing two other members of the National Council to the National executive committee as he deems necessary, in an ad hoc capacity.

Section 2. The National executive committee shall meet upon call of the National President at such times and places as he may designate.

Section 3. The National executive committee shall carry out the duties in regard to the honorable dismissal or expulsion of members delegated to it by this constitution, and such duties as may be delegated to it by the National Conclave or the National Council.

Section 4. The National executive committee shall select, supervise, and evaluate the Executive Director.

## **ARTICLE XI. THE NATIONAL STANDING COMMITTEES**

Section 1. The National Finance Committee. The National finance committee shall consist of the National Vice-President of Finance, who will act as chairman. The National President and the National Secretary shall be ex-officio members of the National finance committee but shall have no vote in its resolutions. The National finance committee shall prepare an annual budget for the operation of the fraternity, shall direct the investments of all funds of the fraternity, with the exception of the Phi Mu Delta Foundation, shall approve the choice of a bank or banks in which to maintain and deposit the cash of the fraternity, and shall direct the audit of the accounts of the fraternity.

Section 2. The National Expansion Committee. The National committee on expansion shall consist of an appointee of the National President, who will act as chairman, and four members appointed by the National President with the concurrence of the National Council. The National committee on expansion shall carry on such expansion and colonization activities as are deemed in the interests of the fraternity, each of the four members at-large having in his special care such activities in a particular geographical area. The National committee on expansion shall be empowered to delegate, with the concurrence of the National Council, specific projects to any member or members of the fraternity.

Section 3. The National Scholarship and Academic Achievement Committee. The National committee on scholarship and academic achievement shall consist of an appointee of the National President, who will act as chairman, and two members appointed by the National President with the concurrence of the National Council. The National committee on scholarship and academic achievement shall direct and monitor the scholarship research and academic guidance of the fraternity.

Section 4. The National Alumni Activities Committee. The National committee on alumni activities shall consist of an appointee of the National President, who will act as chairman, and two members appointed by the National President with the concurrence of the National Council. The National committee on alumni activities shall cooperate with chapter alumni organizations and/or geographic alumni clubs

## **ARTICLE XII. ADMISSION, SUSPENSION, EXPULSION, REVOCATION OF THE CHARTER, AND RE-ADMISSION OF CHAPTERS**

### **Section 1. Admission**

Par.1. Any local organization conforming to Article V. Sections 1, 2, and 3, of this constitution and whose members are individually eligible to become members of this fraternity shall be eligible for admission into the fraternity

Par. 2. Any eligible local organization desiring to be admitted into the fraternity shall present an informal petition to the National Council or the expansion committee. An investigation of each petitioning group shall be made by the National Office staff and/or a member or members of the fraternity delegated by the National President, National Council or the expansion committee. Following such investigation, if the informal petition is approved by the executive committee in consultation with the expansion committee, the local organization shall then submit a formal petition for admission. Admission to the fraternity may be approved by the affirmative vote of three-quarters of the National Council. If a member of the National Council fails to take action within fifteen (15) days of the proposal said request shall be considered as ratified by that member.

Par. 3. A local organization, whose admission into the fraternity has been approved, shall become a chapter, and its affiliate members of the fraternity upon undergoing the initiation ceremony and the payment of an initiation fee and any other expenses incidental to initiation. The initiation fee and incidental expenses shall be determined by the National Conclave, which may delegate this duty to the National Council.

Par. 3a. All such fees shall be payable prior to initiation or billed to individuals through a financial management service as directed by National Office.

Par. 4. A charter certifying to the admission of the local organization into the fraternity shall be presented to the local organization. It shall be signed by the National President and the National Secretary.

## Section 2. Suspension

Par. 1. The National Council shall be empowered by a three-quarters vote to suspend any local organization for its continuous failure to meet its obligations.

Par. 2. A local organization under suspension shall: (1) be released from no financial obligations; (2) be understood to be in danger of expulsion or charter revocation; (3) keep in close touch with the National Council and National Office; and (4) be announced as suspended to the authorities and other fraternities on its campus if in the opinion of the National Council, after consultation with the administration of its institution, such action is in the best interest of the fraternity.

## Section 3. Revocation of Charter

Par. 1. If conditions warrant, a local organization may have the charter revoked upon the recommendation of the National Council by a three-quarters vote of its members. The expulsion of said group may be appealed to the next Conclave meeting and brought to a vote of the Conclave

Par. 2. Upon Revocation of Charter, where no recognized alumni association exists, all financial assets shall be placed in a fund to endow future expansion efforts by the national office. All non-financial assets, including regalia and historical documents, shall be held at the National Office or distributed to active Chapters at the discretion of the National Council.

## **ARTICLE XIII. ADMISSION, SUSPENSION, HONORABLE DISMISSAL, AND EXPULSION OF MEMBERS**

### **Section 1. Admission**

Par. 1. Any individual eligible for membership in the Phi Mu Delta Fraternity may be elected to new membership by the collegiate chapter. An eligible individual is: male, enrolled as a full-time student at the college where the chapter is located, and is a member in good standing of his home and campus communities.

Par. 1a. The Collegiate chapter shall elect one of the alternate methods described here to elect a new member to membership as a brother.

Alternate A: Three dissenting votes among the Collegiate members of the chapter to which a new member seeks membership shall constitute a rejection.

Alternate B: Acceptance by any percentage between 80% and 90% of the Collegiate members of the chapter to which a new member seeks membership shall be required to admit him to membership as a brother.

Each Collegiate chapter must make a choice between Alternate A and B. If a chapter selects B, that chapter shall be on record with the National fraternity as to the percentage of its choice. No man may be barred from membership unless a minimum of three negative votes be cast against him.

Par. 2. Each Collegiate chapter shall compete for new members as nearly as possible on the same basis as other similar organizations at its institution.

Par. 3. New members shall be trained and initiated as prescribed in the by-laws to this constitution.

Par. 4. Each new member shall be admitted into membership in the fraternity upon paying the National Initiation Fee and undergoing the initiation ceremony.

Par. 4a. The initiation ceremony must occur in accordance with Article VI of the National By-Laws.

Par. 5. Any properly initiated member in good standing of a local fraternity which becomes a chapter of the fraternity shall be eligible for initiation into the fraternity, or at his request, at any subsequent initiation ceremony conducted by that Collegiate chapter, or, by arrangement, at another chapter.

### **Section 2. Suspension**

Par. 1. A Collegiate chapter may suspend a collegiate member for due cause.

Par. 2. A Collegiate member shall be automatically suspended from his Collegiate chapter when bills due on the Collegiate by him remain unpaid as specified by the chapters by laws.

Par. 3. A Collegiate member under suspension from his Collegiate chapter shall: (1) surrender his badge to the President of the Collegiate chapter; (2) be excluded from social and official fraternity activities of all kinds, but in meetings of the Collegiate chapter may enter into discussion with no power to vote; and (3) be released from no financial obligations.

Par. 4. The National office shall be notified immediately of any member's suspension.

### Section 3. Resignation

Par. 1. In exceptional occasions, when in the best interests of the fraternity, a member may resign from the fraternity.

Par. 2. A member who resigns from the fraternity shall surrender his badge, membership card, and membership certificates to the National Secretary or National Office. Par. 2. Each Collegiate chapter shall compete for new members as nearly as possible on the same basis as other similar organizations at its institution.

Par. 3. The National Office shall be notified immediately of any member's resignation.

### Section 4. Expulsion

Par. 1. A member may be expelled from the fraternity if he is: convicted of a serious crime or proven guilty of other charges of a serious nature, upon the recommendation of a Collegiate chapter or chapter alumni association by a three-quarters vote of its members, approved by the National Council, or directly by action of the National Council.

Par. 1a. The failure of any member upon leaving college to make satisfactory arrangements to pay any financial obligations incurred to a Collegiate chapter, chapter alumni association, alumni housing corporation or the National organization shall be considered as presumptive evidence that he has been guilty of a serious nature.

Par. 2. A member expelled from the fraternity shall surrender his badge, membership card, membership certificates to the National Secretary and any organizationally provided regalia and may not attend future chapter or alumni events.

Par. 3. The National Office shall be notified immediately of any member's expulsion.

## **ARTICLE XIV. FINANCES**

### Section 1. National Finances

Par. 1. The finances of the fraternity shall be enrolled and directed by the National Council and the National finance committee and conducted by the National Vice- President of Finance in accordance with the provisions of this constitution.

Par. 2. The National Conclave shall determine the installation fee and other expenses incidental to the installation of new chapters, and the Initiation fee which shall be paid prior to initiation, but may delegate any or all of these powers to the National Council.

Par. 3. The Initiation Fee, as stipulated in the by-laws shall entitle the new member to a jeweled Collegiate brother's pin, a copy of the new member manual, and other incidental items as available. It shall also entitle an initiate to his certificate of membership, membership card, a copy of the constitution, and maintenance of his lifetime directory records. Alumni members in good standing of a local fraternity which becomes a chapter of Phi Mu Delta may, at their individual option, receive The Triangle magazine by paying annual alumni dues in the amount set by the National Council or the National Conclave.

Par. 4. Each chapter shall be responsible for the collection and remittance, when due, of all fees and dues to the National Office.

Par. 4a. The chapter Vice-President of Finance is responsible for providing data to any financial management service utilized by the fraternity for the purpose of billing of fees to individual members.

Par. 5. No man shall be properly initiated into the fraternity until his Initiation Fee has been transferred to the National Office and required biographical information has been provided.

## Section 2. Local Finances

Par. 1. The finances of each local organization shall be controlled and directed by the respective Collegiate chapter executive committee.

Par. 2. Each chapter executive committee shall institute for itself and the respective Collegiate chapter an adequate accounting system approved by the National Office.

Par. 3. The Vice-President of Finance of each chapter shall submit to the National Office all financial records for review; i.e., balance sheet and profit and loss statement, within 30 days after closing the books, for the preceding period.

## **ARTICLE XV: RITUALS, INSIGNIA AND PUBLICATIONS**

Section 1. The National Conclave shall authorize such rituals, insignia, and publications as it considers necessary.

## **ARTICLE XVI. SCHOLARSHIP**

Section 1. Each new member shall have a minimum high school grade point average (GPA) of 2.3 on a 4.0 scale for first semester freshman year and a minimum college GPA of 2.25 thereafter. Collegiate members failing below this standard shall be suspended until they meet academic requirements.

Section 2. The annual cumulative GPA of the chapter shall be at or above each host campus' all-men's average.

## **ARTICLE XVII. CONDUCT**

Section 1. Members of the fraternity shall conduct themselves, at all times, as befits gentlemen.

Section 2. Members of the fraternity shall observe the regulations of their respective institutions with regard to the use of intoxicating liquors and controlled substances, and shall at all times avoid intemperate conduct which would lead to injure the reputation of the fraternity.

Section 3. Public informal initiations by any Collegiate chapter or alumni association of the fraternity are forbidden.

Section 4. No informal initiation, or any other chapter sanctioned activity in any Collegiate chapter, shall consist of anything immoral, demeaning, obscene, or endangering to the physical or mental health of the individual.

## **ARTICLE XVIII. AMENDMENTS**

Section 1. Amendments to this constitution may be presented at the National Conclave or in writing to the National Secretary by any Collegiate chapter, chapter alumni association, or member of the National Council.

Section 2. This constitution may be amended by the National Conclave by a three- quarters vote, provided the proposed amendment has been circulated at least sixty (60) days prior thereto.

## **ARTICLE XIX. EFFECTIVENESS**

Section 1. This constitution shall become effective as of Midnight, August 6, 2016 and shall supersede all previous constitutions of the fraternity.





## **ARTICLE I. MEETING OF THE NATIONAL FRATERNITY**

Section 1. A committee on National Conclave arrangements shall be appointed by the National President to prepare and recommended arrangements for meetings of the National Conclave, subject to the approval of the National Council.

Section 2. A credentials committee, appointed by the National President, shall examine and pass upon the credentials of each delegate to the National Conclave.

Section 3. The order of business at the meeting of the National Conclave shall be established by the National Council and shall be sent to all collegiate and alumni delegations not less than thirty (30) days prior to the meeting of the National Conclave.

Section 4. Parliamentary law, as defined by Robert's Rules of Order, shall govern the proceedings of meetings of the National Conclave.

## **ARTICLE II. FINANCES**

Section 1. The National Council shall be empowered to determine the installation fee for a new chapter.

Section 2. Each chapter will transmit to the National Office, or a financial management service utilized by the fraternity and prior to the time of initiation an Initiation Fee for each man.

Par. 1. Collegiate dues, to cover expenses incidental to the operation of the fraternity, shall be established by the National Council. Each chapter will transmit to the National Office or a financial management service utilized by the fraternity, the fees, as specified by the National Conclave, for each Collegiate member. Collegiate dues are currently referred to as Brother Service Fees. The National Conclave may delegate the power to establish the amount of the Brother Service Fee to the National Council.

Section 3. The National Office shall assess a fine against each chapter alumni association and/or Collegiate chapter against each illegally initiated man. The fine shall be set by National Council, no more frequently then annually, and they will inform chapters of any changes from the previous fine structures

Section 4. Each member and new member will be assessed a Risk Management fee in the fall semester. This amount is determined through Risk Management Vendors in association with the national office and Council. Should a significant amount of members fail to pay the Risk Management Assessment in a timely manner, the chapter/colony will be ordered to cease all functions until the fee is paid.

Section 5: The National Council maintains the ability to set additional fees, in emergency circumstances, in order to meet the financial obligations of the National Fraternity.

### **ARTICLE III. INSIGNIA**

Section 1. The coat-of-arms shall consist of the scales of justice on a shield of protection, over which is mounted the lion of strength and power bearing the red, white, and blue shield of America, and under which runs a ribbon bearing the Greek lettering "Phi Mu Delta".

Section 2. The standard badge, which shall always remain the property of the fraternity shall be surrendered upon the suspension, resignation, or expulsion of a member. It shall consist of a black triangular field, containing the Greek letters "Phi Mu Delta" in gold about a sapphire center and bordered with white pearls.

Par. 1. The official and exclusive supplier for the standard badge shall be a vendor selected by the Executive Director.

Section 3. The sister pin shall be manufactured by a supplier selected by the Executive Director. It shall be similar to the standard badge, but no smaller in size.

Section 4. The new member pin shall be manufactured by a supplier selected by the Executive Director. It shall consist of a shield with three fields, each bearing one of the colors of the fraternity and each enclosing the scales of justice.

Section 5. The colors of the fraternity shall be Princeton orange, black, and white.

Section 6. The flower of the fraternity shall be the jonquil.

Section 7. The National Council shall specify the description of the official flag of Phi Mu Delta, and shall authorize manufacture and issue of such to chapters or members who desire to purchase same.

Par. 1. The flag has a fly end consisting of a square of black bearing the fraternity crest (a lion rampant in golden yellow, head turned toward the fly end, holding a shield of America in red, white, and blue. The top of the shield has a field of blue with 13 white stars and the bottom composed of alternate red and white stripes. 13 in number, the outer two are red). The lion sits on the torsade of the crest which alternates in orange and black. The hoist end of the flag is a field of orange bearing a vertical column of Greek letters in plain black style, PHI MU DELTA.

Par 1a. The flag shall be manufactured and supplied by a vendor selected by the Executive Director.

Par. 2. The official flag shall carry no chapter identification.

Section 8. All standard badges must be ordered through the National headquarters, who will complete the order upon confirmation that all initiation fees have been paid.

Section 9. Only members of the fraternity in good standing may purchase articles bearing the coat-of-arms of the fraternity.

Section 10. The standard badge shall be worn by members and significant others.

Section 11. The National Council shall specify the description of the official banner of Phi Mu Delta, and shall authorize manufacture and issue of such to chapters or members who wish to purchase same.

Par. 1. The banner consists of a Princeton orange field with a black band running diagonally from upper left to lower right corner, containing Greek Letters "Phi Mu Delta" in Princeton orange. The fraternity coat-of-arms shall be located in the upper right field and shall be detailed in black and gold.

Par 1a. The flag shall be manufactured and supplied by a vendor selected by the Executive Director.

Par. 2. Chapter designation shall be optional. If included, it shall be the chapter name designed by Greek letters, the first of which includes the district, and shall be located in the left field. No other type of local personalization is permitted.

#### **ARTICLE IV. PUBLICATIONS**

Section 1. A directory shall be published when ordered by the National Conclave.

Section 2. A ritual pamphlet shall be published when ordered by the National Conclave.

Section 3. The Triangle magazine will be published periodically in conjunction with the Phi Mu Delta Educational Foundation.

Section 4. Other publications necessary to the routine operation of the fraternity may be published at the discretion of the National Council.

#### **ARTICLE V. AWARDS**

Section 1. A National awards system is established whereby several vital aspects of chapter well-being are recognized.

Par. 1. Winning chapters will be determined by the National Council upon evaluation of nominations and award applications submitted by each chapter or through the use of an accreditation program developed by National Council.

## **ARTICLE VI. NEW MEMBER EDUCATION**

Section 1. New member education shall at all times be carried on in the spirit of the Constitution of Phi Mu Delta. Article XVII, Section 4.

Section 2. Training shall include, but not be limited to, the procedures set forth in The Oracle: The Official Education Manual and Membership Development Program of The National Fraternity of Phi Mu Delta.

Section 3. Alcohol shall be prohibited from all activities related to recruitment or associated with the new member education program.

Section 3. Alcohol shall be prohibited from all activities related to recruitment or associated with the new member education program.

Section 4. New member education, beginning with induction, shall last no longer than eight academic weeks of actual new member education.

Section 5. To enhance the new member education the chapter shall maintain a mentorship program. Educational material to support the program shall fall under article XV Section 1 of the constitution of Phi Mu Delta.

## **ARTICLE VII. INITIATION**

Section 1. Membership as a brother in the Phi Mu Delta Fraternity can be gained only by experiencing the ceremony described in the "Official Pamphlet of Phi Mu Delta-Initiation Ceremony and Instructions."

Section 2. No new member otherwise eligible for initiation shall be initiated until his initiation fee has been paid.

## **ARTICLE VIII. CHAPTER STANDARDS AND ETHICS BOARD**

Section 1. The Chapter Standards and Ethics Board shall be comprised of the National Vice-President of Membership, who will serve as chairman, and, at least five other alumni and undergraduates, in good standing, of his choosing.

Section 2. The Chapter Standards and Ethics Board shall be in charge of hearing and ruling on all disciplinary actions brought against collegiate chapters and colonies of the National Fraternity.

Par. 1. Based on the severity of the individual case, the Standards and Ethics Board can enforce or overturn fines, suspend chapters for financial or disciplinary reasons, place chapters on probation, sanction chapters with educational sanctions or community service hours, or recommend that a charter be revoked from a collegiate chapter.

Par. 1a. A collegiate chapter may be sanctioned for committing any of the following offenses:

1. Failure of a collegiate chapter or colony to conform to the National Constitution or Chapter Constitution or By-Laws of either.
2. Failure of a collegiate chapter or colony to follow the policies of the host campus  
where a chapter is located.
3. Failure of a collegiate chapter or colony to follow the orders of the National Council.
4. Failure of a collegiate chapter or colony to pay fines, dues, or other penalties.
5. Failure of a collegiate chapter or colony to follow FIPG policies.
6. Failure of a collegiate chapter or colony to follow proper procedures for initiation and ritual.
7. Failure of a collegiate chapter or colony to comply with sanctions directed by the Standards and Ethics Board.
8. Conduct which is unbecoming of a member of Phi Mu Delta and brings disgrace in the eyes of the public.
9. Failure of a collegiate chapter or colony to initiate a sufficient number of members, resulting in an insufficient number of collegiate members to run the daily functions of the chapter.

Par. 2. Sanctions shall be set by the members of the Standards and Ethics Board and enforced by the National Office.

Par. 2a. Failure to complete sanctions will result in the suspension of the group until such time that the sanctions are completed.

Par. 3. The status of all sanctioned collegiate chapters or colonies will be reviewed at each subsequent National Council Meeting. On review, the National Council may change the status of the Chapter or declare that more time is required to complete the sanctions.

Par 4. A Chapter in good standing shall be defined as any chapter that does not currently owe funds to the National Office and or not currently facing sanctions by the National Office.

## **ARTICLE IX. CHAPTER STANDARDS AND ETHICS BOARD PROCEDURES**

Section 1. When the National Fraternity becomes aware of any violation of Fraternity Policy it will be the duty of the National Office to investigate the violation.

Par. 1. The collegiate chapter or colony is responsible for filling out an incident report and submitting it to the National Office within 72 hours of the violation or 24 hours after the violation is reported to the National Fraternity by a source outside of the Fraternity.

Par. 2. The National office will request that additional reports from the host institution be submitted, if available.

Par. 3. The National Office will submit copies of all reports to the Chapter Standards and Ethics Board and set-up a conference call with all members and the accused Chapter's President. The conference call will serve as the official hearing of the incident.

Par. 3a. The accused Chapter's President will have an opportunity to answer and ask any questions during the conference call.

Par. 3b. The accused Chapter may include any additional witnesses during the conference call.

Section 2. The Chapter Standards and Ethics Board will determine responsibility based on information taken from reports and during the conference call.

Par. 1. Responsibility will be determined by a majority vote of the Board.

Par. 2. Sanctions will be determined and approved by a majority vote of the Board.

Section 3. Decisions of the Standards Committee can be appealed to the Past National President. The Past National President's decision may be appealed to the National Conclave, or National Council in non-Conclave years. The National Conclave or National Council has the final say in disciplinary appeal hearings.

## **ARTICLE X. LITTLE SISTER/AUXILIARY ORGANIZATIONS**

Section 1. All chapters and colonies are prohibited from organizing and/or maintaining auxiliary organization ("little sister") groups. Such groups are in violation of Title IX of the Federal Higher Education Reauthorization Act.

## **ARTICLE XI. AMENDMENTS**

Section 1. These by-laws may be amended at any time by a simple majority of the National Council. In times between conclaves bylaws may be amended via a vote canvassed by the National Secretary voting time on any question being thirty (30) calendar days from the date of the post mark on the envelope (or the date/time stamp on the electronic mail message) in which the question to be voted upon is mailed, provided, however, that a quorum of votes are received within that time.



### *Open Expansion*

Whereas, as a member organization of the North-American Interfraternity Conference, the National Fraternity of Phi Mu Delta supports the expansion positions of the conference and its member organizations, and

Whereas, the National Fraternity of Phi Mu Delta believes, that the a strong and thriving college and university based fraternity community benefits each chapter as well as the National Fraternity, and

Whereas, the National Fraternity of Phi Mu Delta recognizes that the size of any national fraternity is not indicative and that fraternity's ability to administer a successful expansion project and provide a positive fraternal experience, and

Whereas, the National Fraternity of Phi Mu Delta, supports the growth of fraternal opportunities by working in cooperation with colleges and universities to provide a positive fraternal experience, and

Whereas, the National Fraternity of Phi Mu Delta, recognizes the right of any collegiate group to seek affiliation in a fraternity of its choice,

Therefore, Let It Be Resolved that the National Fraternity of Phi Mu Delta reaffirms its commitment to act in good faith and supports the rights and responsibilities of all students in looking to gain a fraternal experience as well as the rights all member fraternities in their efforts to continue to provide a positive fraternal experiences.

### *Freedom of Association*

Whereas, The North-American Interfraternity Conference has long maintained as a cardinal value the rights of college and university students freely to associate and responsibly to exercise their freedom of speech; and

Whereas, the National Fraternity of Phi Mu Delta supports the NIC's anticipation that each campus ensures that no NIC member organization is prohibited from selecting undergraduates for the purpose of establishing a chapter on the campus of the host institution, and

Whereas, the National Fraternity of Phi Me Delta supports the opportunity for each college man in good standing with his college/university to decide when is the best time for him to affiliate with a fraternity if he so chooses, and to do so without restriction from his institution

Therefore, Let It Be Resolved that the National Fraternity of Phi Mu Delta supports the freedom of association of all college students and disapproves of measures enacted by colleges and universities that target fraternities and are not applied equally to the entire student body.

## *Contiguous U.S. Event Policy*

Whereas, the National Fraternity of Phi Mu Delta, as well as each undergraduate member is provided general liability insurance and protection for acts that occur under the auspices of and within the guidelines and expectations of the fraternity, and

Whereas, this coverage does not extend to fraternity events occurring outside of the contiguous United States, and any event occurring outside of the contiguous United States is done so at great risk to the fraternity and its members, and

Whereas, some chapters may either consider hosting or host events that occur outside of the contiguous United States for the purposes of avoiding fraternity policies and applicable federal, state, and local statutes, and

Whereas, these actions are not congruent with the mission, values, and expectations of Phi Mu Delta, Therefore, Let It Be Resolved that no chapter of Phi Mu Delta, nor may any member, contract to host or sponsor an event in the name of Phi Mu Delta outside of the contiguous United States.

## *Sexual Harassment Policy*

Whereas, given the values and founding principles of Phi Mu Delta, and

Whereas, the fraternity values the dignity and respect of all individuals, and

Whereas, as a member of FIPG, and a supporter of the FIPG Risk Management Policy,

Therefore, let it be resolved that the Sexual Harassment Policy of the National Fraternity of Phi Mu Delta read as follows:

Phi Mu Delta Fraternity will not tolerate or condone any form of sexist or sexually abusive behavior on the part of its members, whether physical, mental, or emotional. This is to include any actions which are demeaning to women or men. The fraternity will not tolerate sexual assault in any form.

Furthermore, let it Be Resolved that Phi Mu Delta chapters, colonies, and membership will not sponsor or participate in any activity, including competitive games and other endeavors, which are abusive and degrading to human beings. Each chapter will educate its membership on the issues of sexual harassment/assault through Phi Mu Delta's Risk Management Program and The Oracle New Member Education Program.

## *Exotic Dancer/Treatment of Women Policy*

Whereas, given the values and founding principles of Phi Mu Delta, and

Whereas, the fraternity values the dignity and respect of all individuals, and

Whereas, as a member of FIPG, and a supporter of the FIPG Risk Management Policy,

Whereas, the National Fraternity of Phi Mu Delta reaffirms its fraternal values and the respect for the dignity of all persons,

Therefore, let it be resolved that no chapter or member acting on behalf of Phi Mu Delta fraternity shall engage or participate in acts or performances that are degrading to any person.

Furthermore, be it resolved that no fraternity event or function should involve exotic dancers.

## *Auxiliary Groups/Little Sisters Policy*

Whereas, the North-American Interfraternity Conference has taken a position against auxiliary women's organizations, commonly referred to as "little sisters", as a practice that is inconsistent with the concept of separate and equal women's fraternities, and

Whereas, the Fraternity Executives Association has taken a position against auxiliary women's organizations, and Whereas, "little sister" groups pose a real and tangible threat to Phi Mu Delta's protected status as a single sex organization, and

Whereas, "little sister" groups are not desirable adjuncts to a chapter of Phi Mu Delta,

Therefore, Be It Resolved that the National Fraternity of Phi Mu Delta reaffirms its position on not supporting "little sister" organizations as part of the fraternal experience and its commitment to ensuring that each chapter of Phi Mu Delta act in accordance with the spirit of this resolution.

## *Thematic Events Policy*

Whereas, given the values and founding principles of Phi Mu Delta, and

Whereas, the fraternity values the dignity and respect of all individuals, and

Whereas, as a member of FIPG, and a supporter of the FIPG Risk Management Policy,

Whereas, the National Fraternity of Phi Mu Delta reaffirms its fraternal values and the respect for the dignity of all persons,

Therefore, Be It Resolved that no event or function sponsored by any chapter or any member on behalf of the fraternity have an event theme that is degrading or derogatory to any person, persons, race, ethnicity, creed, gender, or any other group or collection of individuals.

## *Position Statement on Transgendered Membership*

Whereas, Phi Mu Delta Fraternity was founded as an inclusive and non-discriminatory organization in 1918, opening its membership to all men seeking to live our values; and,

Whereas, Phi Mu Delta seeks to create leaders who are able to be successful in a global and diverse society; and,

Whereas, Fraternities and sororities have the right under the United States Constitution and civil rights laws to exist as single-gender organizations and to maintain that status, especially under the First and Fourteenth Amendments. Further, Title IX of the Educational Amendment of 1972 provides that sexual discrimination shall not apply to membership practices of a social fraternity or social sorority that is exempt from taxation under section 501 of the IRS Code of 1954, the active membership of which consists primarily of students in attendance at an institution of higher education; and,

Therefore, be it resolved by the National Council on November 5, 2011, Phi Mu Delta remains true to our history of inclusion by allowing chapters to offer membership to those individuals who are legally recognized as male by state or federal standards and regulations



# National Programs

## *National Conclave*

National Conclave is the supreme legislative body of the Fraternity. It is a biennial event occurring on the even-numbered years. At Conclave, members elect national officers, determine National Constitution and By-Law changes, and make recommendations on the policies and operation of the Fraternity.



Anyone from a chapter/colony is welcome to attend, the National Constitution states that each chapter/colony is required to send three undergraduate delegates to Conclave –two heads (usually the president and highest-ranking officer attending) and one alternate delegate. The two head delegates

serve as the chapter's undergraduate votes, and if a head delegate is not on the floor, the alternate serves as the vote.

## *Sapphire Leadership Institute*



The Sapphire Leadership Institute is held biannually to assist all undergraduate members who are interested in learning more about leadership. This program allows participants to practice their own leadership skills in preparation for their growing role as chapter leaders. Each chapter and colony is expected to send four members this a four-day residential experience.

### **Learning Outcomes:**

- Understand leadership types and styles
- Develop and improve leadership skills
- Gain a perspective for the future and that of the organization
- Identify that a member can lead the chapter with or without a position or title
- Develop friendships with other brothers that can also serve as future resources and connections
- Create a relationship with a mentor that assists participants through challenge and learning during and after the program.

## *Navigator*

Navigator is an elite program designed to introduce newly initiated members to the possibilities of their lifelong membership. This program runs concurrently with the Sapphire Leadership Institute and chapters/colonies are required to nominate one newly initiated member to attend. To qualify, the member must have been initiated during one of the previous two semesters.



### **Learning Outcomes:**

- Understand the responsibility and take advantage of a lifelong membership in Phi Mu Delta
- Create a plan for a fraternity membership for life
- Develop relationships with Phi Mu Delta alumni through networking
- Understand and express how the ritual of Phi Mu Delta Fraternity affects a member's daily life

## *Officers' Academy*

Each January, Phi Mu Delta Fraternity hosts Officers' Academy. The purpose of this program is to offer nuts & bolts training to all newly elected officers. This three day training workshop provides officers with the essential tools to manage chapter operations and attain goals for the coming year. All five members of the executive board are expected to attend,



### **Learning Outcomes:**

- Develop and Improve leadership skills
- Explain the importance of ensuring smooth transitions from past to new officers
- Develop skill sets to manage daily chapter operations
- Demonstrate the importance of teamwork within an executive board
- Discover the value in for strategic planning and goal setting for leaders and organizations

## *Leadership Summit*

The Regional Leadership Summit is designed to assist Chapter and Colony leaders in addressing current organizational issues and seek solutions. Participants are invited to share ideas, issues and solutions.

### **Learning Outcomes:**

- Identify current leadership issues within the chapter or colony
- Describe solutions to issues through providing a forum to explore current chapter operations
- Develop and improve presentation skills



## *Recruitment Academy*

Regional Recruitment Academies Phi Mu Delta is proud of its relationship with Phired Up Productions, Inc. who have provided our curriculum and facilitators for our Regional Recruitment Academies held in late August each year. The Fraternity whole heartedly supports and encourages our chapters and colonies to employ Dynamic Recruitment techniques and Social Excellence programming to ensure strong recruitment numbers with high quality membership.

### **Learning Outcomes:**

- Identify and understand your chapter/colony's recruitment goal
- Understand the Phi Mu Delta values and how they affect recruitment
- Understand how to find potential new members
- Recognize Phi Mu Delta's values in potential new members
- Understand and utilize recruitment skills
- Develop a recruitment plan for the academic year



# Strategic Plan

## 2016

- July:** The National Fraternity will develop a headquarters staffing plan to be implemented by 2018.
- July:** The National Fraternity will develop a holistic communication plan.
- August:** Phi Mu Delta will produce volunteer job descriptions for every position.
- September:** A strategy will be implemented to strengthen chapter stability and resilience.
- September:** The National Fraternity will host regional summits and recruitment academies.
- October:** New issues of the Triangle Magazine will be published.
- December:** The results will be published of the new Membership Census.
- December:** A Colony-to-Chapter program will be developed to coach colonies through developmental milestones.

## 2017

- July:** A plan will be implemented to preserve Phi Mu Delta's historical artifacts.
- September:** The National Fraternity will create a peer mentoring program by pairing struggling chapters/colonies with existing high performing chapters.
- December:** The National Fraternity will plan to acquire a standalone database
- December:** A new membership perception assessment will be implemented.

## 2018

- April:** Phi Mu Delta will adopt a new branding strategy.
- May:** The Fraternity will grow to 22 chapters with an average membership of 35 men bringing the total Phi Mu Delta membership to 770 undergraduate members.
- June:** The National Fraternity will implement a system of recruiting and training volunteers.
- July:** The Becoming Lions member enrichment program will start.
- July:** The National Fraternity will design and create networking opportunities between undergraduate and alumni members
- July:** The Fraternity will recruit a substantial number of stakeholders to support the organizations goals and mission
- July:** Every chapter that has more than 100 initiates will be supported by an active alumni association
- July:** A network of regional alumni social clubs will be created.
- August:** 50% of Phi Mu Delta's undergraduate membership will have participated in a National Fraternity sponsored program or event.
- August:** The Centennial Conclave will welcome over 100 undergraduates and 100 alumni
- September:** All National Fraternity programs will have assessed learning outcomes.

## 2019

- March:** A plan will be created with the goal of doubling the number of undergraduate members who attend the Sapphire Leadership Academy
- July:** Strategic partners will be identified and curated.
- July:** The National Fraternity will begin to implement its first immersive service program



Phi Mu Delta chapters and colonies have many support systems – the National Office, the campus Greek Advisor(s), National Volunteers, and a Chapter Advisory Board. These are some steps chapter/colony members can take in order to develop their six person advisory team.

### **STEP 1: BRAINSTORM**

Identify people that have been instrumental in the chapter/colony's success – think of alumni, faculty, staff, people in the local community, family members, etc. How did they support the chapter/colony? Some advisors may be able to provide support virtually, if they do not live near campus, but it's important that at least a few are in the local area. Note: Advisors do not have to be Phi Mu Delta alumni, but they do need to be a positive support for the chapter/colony.

### **STEP 2: MEET AND ESTABLISH A RELATIONSHIP**

If you haven't met this person – set up a meeting. This requires you to reach out to people or if they work on campus, stop in their office to set up a meeting. Only sending an email or two, and expecting a relationship, is not going to be effective. Be proactive in your search.

Once you've met the person, or maybe you've already met, get to know them. Ask them about their interests, collegiate experience, etc. and be genuine. If your only goal in this conversation is to get them to be advisor, you've missed out on a great opportunity. Even if the person can't commit to being on the advisory team, they can still be a resource for your chapter/colony!

### **STEP 3: EXPLAIN EXPECTATIONS**

How are you approaching the question of asking them to be an advisor? If you are unprepared to answer questions from this potential advisor, they are probably going to decline your offer. (Wouldn't you?) Explain why you're asking them to serve as an advisor, what you think they can bring to the team, and the type of commitment you are asking for.

It is an expectation of the National Office that the Chapter Advisor, at least, regularly attends chapter meetings!

#### **STEP 4: INTRODUCE THEM TO THE CHAPTER**

Once they understand the expectations of being an advisor, invite them to attend a chapter meeting so they can meet other members and understand the basic operations. Allow them to sit back and observe the meeting and provide an opportunity for members to get to know them.

#### **STEP 5: INVITE THEM TO FRATERNITY RELATED EVENTS**

This is where they can candidly meet other members of the chapter/colony and see who you are outside of chapter meetings. Similarly to recruitment, invite them to normal activities you do as a group – brotherhood events, service projects, philanthropy events, fundraisers, etc.

#### **STEP 6: ASK THEM TO BE A PART OF THE TEAM**

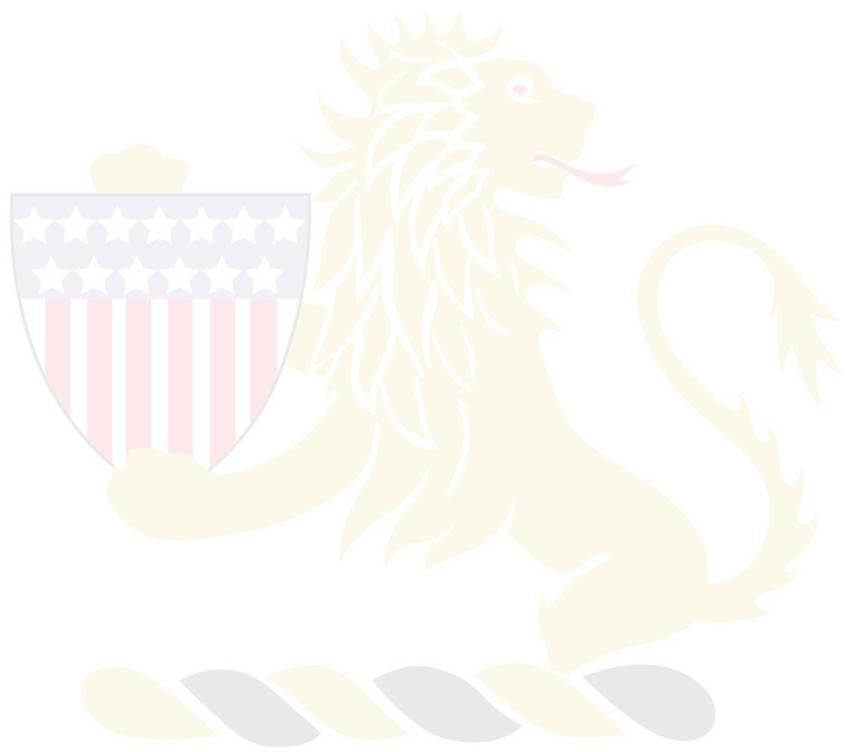
Is there a specific role you need this person to fill or does he/she have the opportunity to select a role, based on interests and commitment level? When asking them to serve, ensure to provide them with an understand of what this role means!

#### **STEP 7: EDUCATE**

Once they've agreed to be an advisor, allow them to learn about the group in their own way. Some like to sit back and watch a few chapter meetings, whereas others like to dive in and ask questions. Provide them with important documents about the organization – the National Volunteer Handbook, local Constitution/By-Laws, a roster with contact information, a calendar of events, meeting minutes, etc.

It may take some time for this person to learn about the group, depending on their experience with Phi Mu Delta – allow them to learn and teach what you know. The National Office will have a certification program soon for Chapter Advisors!





# *The Members*





# Membership Information

## PHI MU DELTA • \_\_\_\_\_ CHAPTER BASIC MEMBERSHIP EXPECTATIONS

Bound by our oath to each other and to the Creed by which we live, we are obligated to hold each Brother accountable. In so doing, the members of \_\_\_\_\_ Chapter agree to the following basic expectations of membership and to hold accountable those men who fail to abide by these standards.

### Statement of Membership Expectations

- To abide by the Constitution of Phi Mu Delta Fraternity and the by-laws of the \_\_\_\_\_ chapter.
- To attend weekly chapter meetings.
- To become a member of at least one committee and participate in its meetings.
- To promote Phi Mu Delta's values of Democracy, Service and Brotherhood.
- To abide by the Risk Management Standards of Phi Mu Delta Fraternity and the rules established by the <College or University>, especially those relating to alcohol.
- To neither use nor support the use of illegal drugs or the misuse of alcohol.
- To neither participate in, nor allow any member of my chapter to participate in any form of hazing.
- To maintain at least a **XXX (out of 4.0)** semester grade point average.
- To actively assist in increasing chapter membership by participating in all recruitment events.
- To meet all my financial obligations to the \_\_\_\_\_ chapter and Phi Mu Delta Fraternity in a timely manner.
- To support and conform to all requirements and standards for fraternities at <College or University>
- To assist in the upkeep and maintenance of the Chapter House.
- To confront and hold accountable any member who does not abide by this agreement.

### Failure to meet member expectations

- The means of discipline within the chapter shall be the following:

- Removal of voting rights
- Assigning of additional community service hours
- Fines
- Suspension from specific chapter activities
- Removal from office or Suspension from the chapter
- Expulsion from the chapter
- The Judicial Board can also assign more specific disciplines as they deem appropriate to help educate the individual or chapter, prevent reoccurrence of the misconduct, or provide compensation to a wronged party.
- The Membership Expectations apply to a member's actions at all times, and is not limited to Phi Mu Delta or <College or University> events.
- The Judicial Board should inform the chapter of any rulings at each chapter meeting during its report, but can inform an individual of its rulings at any time.
- The accused can appeal any ruling made by the Judicial Board to the General Body of the chapter
  - The appeal must be made within 7 days of receiving the ruling of the Judicial Board.
  - The appeal must be written giving the reasons why the ruling is unjust
  - The accused will read his appeal and the Vice President of Membership will be allowed to give a statement explaining why the Judicial Board came up with their ruling.
  - A  $\frac{3}{4}$  vote is required of the General Body to overturn a ruling.
  - If a decision is overturned the Executive Committee shall review the misconduct in place of the Judicial Board, keeping the chapter's decision in mind, and decide on an appropriate action. The action of the Executive Board is final.



# *General Rights & Responsibilities of Chapter Members*

Members are expected to understand the purpose of the National Fraternity and pursue activities which fulfill its purpose. It is understood that the objectives of the chapter will be compatible with the objectives of the National Fraternity and the college/university and not in violation of college/university, local, state and federal regulations and statutes.

1. Members are expected to attend meetings and functions.

2. Officers are expected to inform and involve members and the advisor prior to making any financial commitments. The advisor and the members of the chapter may wish to define what expenditures should be reviewed by the advisor.

3. Members are expected to take advantage of opportunities to enhance their skills (i.e. participation in Conclave, Sapphire Leadership Academy, Regional Leadership programs, etc.).

4. Members are expected to provide positive and constructive feedback and confront inappropriate behavior in other members and the advisor which they deem to be detrimental to that individual and/or the chapter.

5. Members are expected to treat the advisor as an individual who possesses dignity, worth and self-direction.

6. Members have the right to be listened to by other members and the advisor.

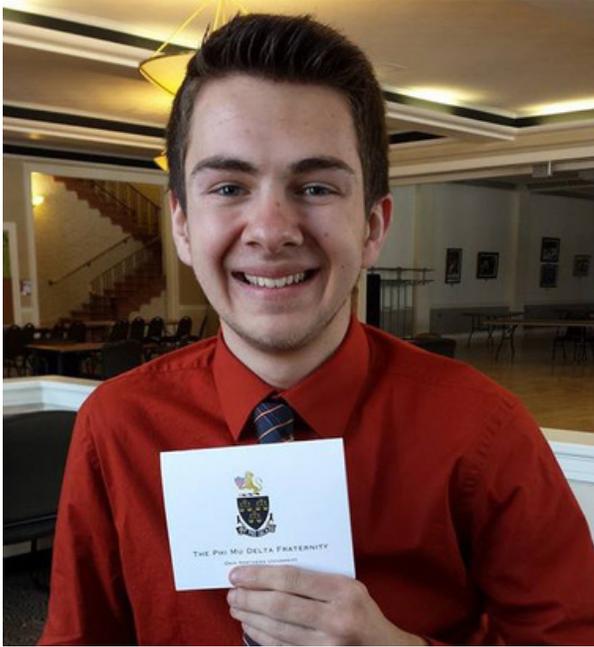


7. Members have the right to choose their levels of involvement in the chapter.

8. Members have the right to voice their disagreements with the decisions of the advisor and appeal those decisions to the District Governor.

# *New Member Bill of Rights*

1. The right to attend all meetings of my chapter, unless the meeting deals with the Initiation Ritual of Phi Mu Delta.



2. The right to vote on all matters related to Phi Mu Delta. The only exceptions are when voting on the elimination of a fellow new member, on Initiation, or during a Judicial Board Hearing for a member.

3. The right to refuse any duty or task that other initiated members would not do with me, are illegal, immoral, or unethical.

4. The right to participate in all chapter activities and programs.

5. The right to know the date of my Initiation at least one month prior to the date of the Initiation Ritual.

6. The right to serve the chapter on a committee.

7. The right to wear the letters of Phi Mu Delta, our symbols and coat-of-arms in an appropriate manner.

8. The right to participate in activities outside of Phi Mu Delta on campus and in the community.

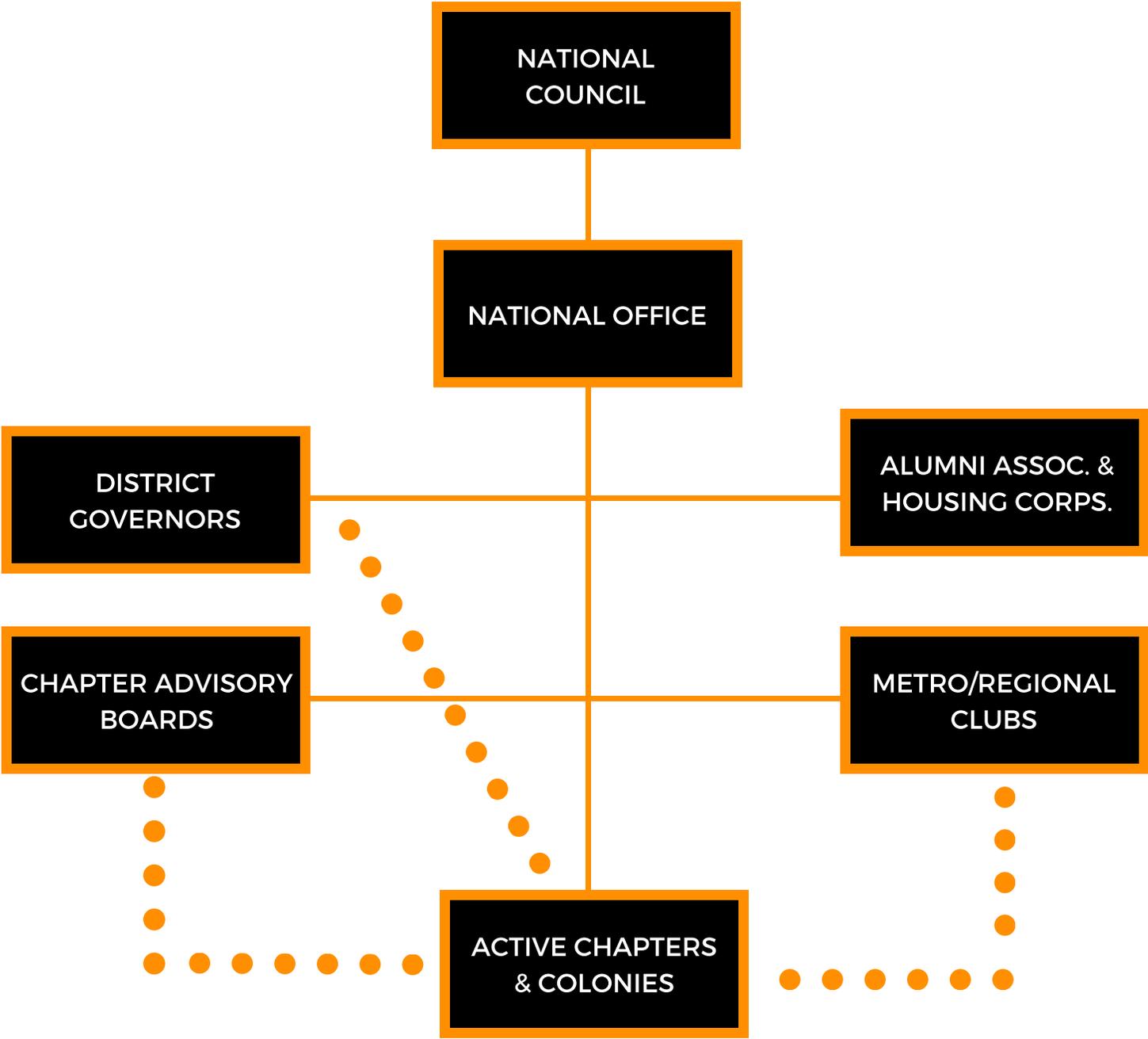
9. The right to confront and hold accountable any new member or initiated member when he does not meet his obligations of membership or have violated our values and ideals.

10. The right to have an engaged and qualified Big Brother to assist me through the New Member Orientation process.





# Governing Structure





# Risk Management

## *Phi Mu Delta Risk Management Policy*

The Phi Mu Delta Risk Management Policy, and that of FIPG, Inc. to which Phi Mu Delta is a contributing member, includes the provisions which follow and shall apply to all fraternity entities and all levels of fraternity membership.

### **ALCOHOL AND DRUGS**

1. The possession, sale use or consumption of ALCOHOLIC beverages, while on chapter premises, during a fraternity event, in any situation sponsored or endorsed by the chapter, or in any event an observer would associate with the fraternity, must be in compliance with any and all applicable laws of the state, province, county, city and institution of higher education, and must comply with either the BYOB or Third Party Vendor Guidelines.
2. No alcoholic beverage may be purchased through chapter funds nor may the purchase of same for members or guests be undertaken or coordinated by any member in the name of or on behalf of, the chapter. The purchase or use of a bulk quantity or common sources of such alcoholic beverage, i.e. kegs or cases, is prohibited.
3. No members, collectively or individually, shall purchase for, serve to, or sell alcohol beverages to any minor (i.e., those under legal “drinking age”).
4. The possession, sale or use of any ILLEGAL DRUGS or CONTROLLED SUBSTANCES while on chapter premises or during a fraternity event or at any event that an observer would associate with the fraternity, is strictly forbidden.
5. No chapter may co-sponsor an event with an alcohol distributor, charitable organization or tavern (tavern defined as an establishment generating more than half of annual gross sales from alcohol) where alcohol is given away, sold or otherwise provided to those present.
6. No chapter may co-sponsor or co-finance a function where alcohol is purchased by any of the host chapters, groups or organizations.
7. All rush activities associated with any chapter will be a DRY rush function.
8. No member shall permit, tolerate, encourage or participate in “drinking games.”
9. No alcohol shall be present at any pledge/associate member/novice program activity or ritual of the chapter.

## HAZING

No chapter, colony, student or alumnus shall conduct nor condone hazing activities. Hazing activities are defined as: “Any action taken or situation created, intentionally, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment or ridicule. Such activities may include but are not limited to the



following: use of alcohol; paddling in any form; creation of excessive fatigue; physical and psychological shocks; quests, treasure hunts, scavenger hunts, road trips or any other such activities carried on outside or inside of the confines of the chapter house; wearing of public apparel which is conspicuous and normally in good taste; engaging in public stunts and buffoonery; morally degrading or humiliating games and activities; and any other activities which are not consistent with academic achievement, fraternal law, ritual or policy or the regulation and policies of the educational institution or applicable state law.”

## SEXUAL ABUSE & HARASSMENT

The fraternity will not tolerate or condone any form of sexist or sexually abusive behavior on the part of its members, whether physical, mental or emotional. This is to include any actions which are demeaning to women or men including but not limited to date rape, gang rape or verbal harassment.

## FIRE, HEALTH, & SAFETY

- All chapter houses should meet all local fire and health codes and standards.
- All chapters should have posted by common phones emergency numbers for fire, police and ambulance and should have posted evacuation routes on the back of the door of each sleeping room.
- All chapters should comply with engineering recommendations as reported by the insurance company.
- The possession and/or use of firearms or explosive devices of any kind within the confines and premises of the chapter house is expressly forbidden.

## REQUIRED RISK MANAGEMENT EDUCATION

Chapters and colonies of Phi Mu Delta shall annually instruct its students and alumni on the Risk Management Policy of FIPG, Inc. Additionally, all members shall annually receive a copy of said Risk Management Policy.

# *Insurance & Risk Management Frequently Asked Questions*

## **WHAT TYPE OF INSURANCE DO WE HAVE?**

The Fraternity purchases liability insurance, which is insurance that protects the organization against claims from legal liability, provides legal defense, and pays sums necessary to settle claims against the Fraternity/Sorority.

## **WHO IS COVERED UNDER THE INSURANCE POLICY?**

The insurance coverage will pay claims for the following organizations and/or people while performing the duties of their elected or appointed positions within the organization **ONLY IF** the laws and policies of the institution, city, county, state, country and Fraternity/Sorority have been followed:

- A collegiate chapter, when it obeys the laws of the institution, city, county, state, and country entities and the policies of the Fraternity/Sorority.
- Collegiate chapter officers, executive board, committee chairman and members while performing the duties of their positions within the organization.
- All volunteer advisors while performing the duties of their positions within the organization.
- Local house corporations/property management teams while performing their duties.
- Alumnae chapters, clubs and associations and chapter-related educational foundations, their officers and volunteers while performing their duties.
- Parents clubs and their volunteers when acting within the scope of their duties.

Our insurance does not cover anyone who is acting in a criminal way, or a way that could cause harm to someone else. This is not a personal liability policy; it only protects volunteers working within the scope of their duties.

## **WHO IS NOT COVERED BY THIS POLICY?**

- Any individual member, alumna/us, trustee or advisor who is performing tasks outside of their responsibility (e.g., spontaneous social function planned by an individual member, chapter advisor consuming alcohol with collegians, hazing of members, etc.).
- Any member whose illegal or intentional actions result in death or injury to an individual or property damage.
- Members' parents or family members and guests of chapter members.
- College/University administration

## **WHY DO WE NEED INSURANCE COVERAGE?**

- More Colleges and Universities **demand** it for recognition
- Opens the door to expansion and growth
- Perpetuate the organization: Let us continue for the next 100 years
- Recruit and retain alumni involvement
- Protect our undergraduate members when they are acting for and on behalf of the Fraternity/Sorority
- Responsible thing to do

Suppose that someone is injured during a chapter event and this claim becomes a lawsuit. You are named as a defendant. Our insurance will cover you, as well as the Fraternity/Sorority, as long as you are an active, paid member of the organization in good standing, you did not violate any laws or the risk management policy, or intentionally cause harm to the other person, and you were acting in good faith. An individual is protected when acting in the scope of their duties on behalf of the Fraternity/Sorority while in compliance with its policies.

## **WHAT IS CONSIDERED A CHAPTER EVENT?**

To understand what may be considered a Fraternity/Sorority event, consider the following questions. If the answer to any question is "yes", then regardless of the location (annex, brother's/sister's house, apartment), your University, the Fraternity/Sorority, and a court of law may consider it a Fraternity/Sorority event.

Therefore, the policies of the organization need to be followed.

- Was the event pre-planned or pre-meditated?
- Was the event discussed during a chapter meeting or executive committee meeting?
- Was it advertised among the brothers/sisters through any means (word of mouth, flyer, email)?
- Were chapter funds used in any way?
- Did chapter officers help plan the event in any way?
- Did the event occur as a result of a Fraternity/Sorority function (e.g. big brother/sister night, bid night, post-initiation party)?
- Was the property where the gathering occurred owned, rented or leased by a member of the organization?
- Would a third party construe the function as Fraternity/Sorority related?

## **WHAT IS A CERTIFICATE OF INSURANCE?**

A Certificate of Insurance is a form that verifies that you have insurance, states the coverage limits, and identifies who is covered under the policy. All recognized certificates and a copy of the Insurance and Claims manual are sent to the chapter president after full payment is received by Willis. Sometimes your university will want to see a Certificate of Insurance as proof that you have adequate insurance. Contact the National Office, and we will send a copy to your university. But usually, when someone asks for a Certificate of Insurance, they want the Fraternity/Sorority to name them as an additional insured, which means that they want our insurance policy to cover them.

## HOW TO NAME AN ADDITIONAL INSURED?

Only the National Office can approve naming an additional insured to our policy. We consider these requests carefully. If a third party asks you for a Certificate of Insurance naming them as an additional insured, start off by making a request to Willis. They will review the request and then contact us for our approval. The process can take 10 to 14 days. If you are planning an event at a hotel or other venue please also submit a copy of your contract with the facility along with the complete Additional Insured request form from the Insurance and Claims manual.

## WHAT IMPACTS THE PREMIUM RATE?

Fraternities and Sororities are a high risk market, so our insurance premium, the amount we pay to the insurance company, is very expensive. Factors influencing those fees include:

- Lack of interest in insuring fraternities and sororities by the insurance industry in general
- Loss experience for Fraternity/Sorority and sorority organizations as a whole and the individual organizations
- Poor public reputation of fraternities and sororities
- Men's general fraternities are the 6th highest underwriting risk
- A "headline" loss will impact everyone
- Individual loss experience • Premise exposure

## WHAT HAPPENS IF WE DO NOT PAY?

The chapter will be suspended, lose its insurance coverage, and face other disciplinary action by the National Office.



# *Crisis Management*

Unfortunately, some dangerous and harmful situations occur involving brothers of Phi Mu Delta and at times in the chapter house. When these dangerous and harmful situations transpire, it is essential that all brothers are prepared to properly handle the situation. The following information should be considered when preparing a crisis management plan at the chapter and when educating all brothers on the components of that plan.

## **PREPARATION**

These guidelines are provided for you in an effort to ease the shock and provide a logical framework in the event of a crisis. Read them. Distribute them to all brothers and keep them in a readily accessible place. It is our hope that you will never have to use them. Appropriate preventive measures – fire safety, risk management, and others – could help you avoid many potential crises. By taking time to prepare and ultimately prevent tragedies, a brother's life and the chapter's life could be saved.

## **DEVELOPING A CRISIS MANAGEMENT PLAN**



A crisis management plan is only effective if it can be implemented the instant a crisis ensues, and it can only be implemented effectively if each undergraduate brother and alumni brother volunteer are prepared to implement the outlined steps. The entire chapter Executive Committee should review the Crisis Management Plan and be familiar with important concepts of handling a crisis.

Every officer should have a copy of the Crisis Management Plan. Be certain that all brothers in the chapter know that the President or an advisor is in charge in the case of emergency. The President will consult with other brothers who possess more

expertise or insight, including the National Office staff and college/university administration. Final instructions to chapter/colony brothers rest with the President.

In the case that the President is unavailable or absent, the chapter must predetermine who assumes his responsibilities related to the Crisis Management Plan (usually Sgt.-at-Arms or Risk Manager). All brothers must know who is in charge and be prepared to follow instructions.

A review of the chapter's crisis management plan should occur each term.

# *General Crisis Management Procedure*

## **1. NOTIFY APPROPRIATE EMERGENCY PERSONNEL**

Briefly and calmly, explain the situation so that the appropriate emergency personnel can respond.

## **2. CLOSE THE CHAPTER HOUSE OR AREA**

The chapter cannot maintain control if brothers are leaving and strangers are entering. Permit only chapter brothers, alumni brothers, and appropriate officials to enter. Assign a few responsible brothers to calmly control access to the chapter house.

## **3. NOTIFY THE FOLLOW (IN ORDER):**

1. Chapter President
2. Chapter Advisor
3. National Office 609-220-4975
4. University Greek Advisor
5. House Corporation President (if applicable)

## **4. ASSEMBLE ALL BROTHERS FOR A CHAPTER MEETING**

Explain that there is an emergency and that the chapter house is closed. They are not to speak to anyone outside the chapter – the Chapter President or Chapter Advisor will be the official spokesperson for the chapter. Do not discuss details, speculate on events, or otherwise project consequences. To do so would only create unrest and unnecessary upheaval. It is important for the chapter to remain calm.

## **5. HANDLING THE MEDIA**

If the news media should contact the chapter, only the Chapter President or Chapter Advisor should speak for the chapter. With the help and approval of the National Office staff, the chapter will draft an appropriate statement before any response is issued to the media. Media can also be instructed to direct inquiries to the executive director at National Office. Do not release any names until an investigation has been completed and the timing is appropriate.

## **6. INVESTIGATING WHAT OCCURRED**

The Chapter President will work in concert with the appropriate chapter officers and the National Office staff to determine what occurred surrounding the incident. It is important that all information is gathered and shared exercising full disclosure. Once all information is made available, appropriate follow-up actions can be determined.

## **7. COMPLETE THE ONLINE INCIDENT REPORT FORM**

## *Procedure for Reporting Chapter Incidents*

Prompt reporting often prevents minor incidents from developing into major problems. Because of occasional late reporting of accidents or claims (either actual or potential), it is important to remind all chapter brothers and alumni brother volunteers about claims reporting procedures.

To report an accident or potential insurance claim, please follow these instructions:

- If necessary, be sure that the individual(s) receive appropriate emergency care.
- Notify the National Office. (Be sure to make contact with a member of the National Office staff)
- Notify chapter officers and key alumni volunteers
- Notify University/College officials - typically the Greek Adviser
- Do not acknowledge responsibility or admit liability for any accident or occurrence.
- Take record of names and contact information of all parties involved, including witnesses.
- Submit online chapter incident report. Submit a written explanation - Report should include:
  - Name(s) of individual(s) involved in or on the scene of the incident.
  - Phone numbers and addresses of those involved or present.
  - Exact location of incident.
  - Description of circumstances leading up to the occurrence, including time of day, if alcohol was involved, if it was in relation to an official chapter activity
  - What type of treatment and emergency medical attention occurred.

Members insured under the General Fraternity insurance policy shall not, except at their own expense, voluntarily make any payment, assume any obligation or incur any expense other than for first aid to others at the time of the accident.

**ALL GUIDELINES FOR REPORTING ACCIDENTS AND POTENTIAL INSURANCE CLAIMS SHOULD BE IMPLEMENTED IN CONJUNCTION WITH THE FRATERNITY'S CRISIS MANAGEMENT PLAN.**

## *Serious Injury or Death of a Brother*

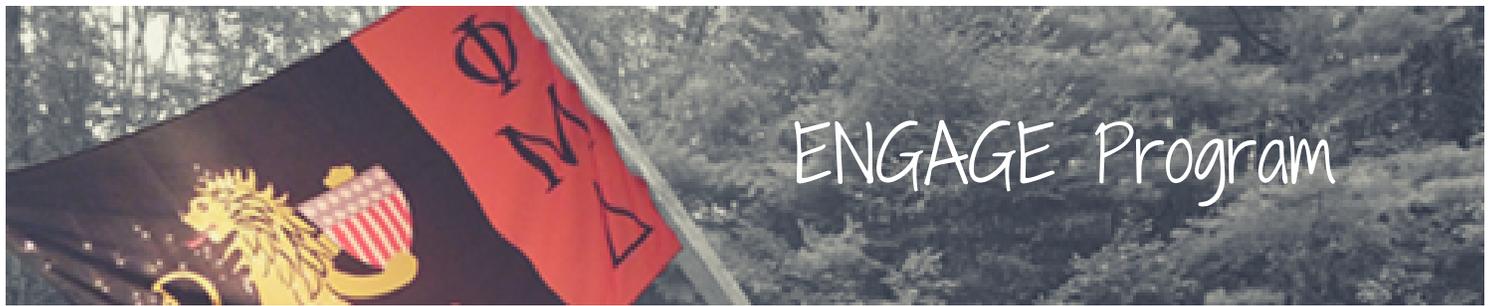
In the event of a serious injury or death, medical or police personnel with appropriate training will notify the family. The chapter should always have parent/guardian information on file for each brother and made available to proper authorities. After the family has been notified, it is appropriate for the President to call and share concerns on behalf of the chapter.

In the event of a death, do not remove any personal items from the deceased brother's room. Do not let brothers enter the room. Temporarily move the deceased brother's roommate to another room in the house, and allow only authorized personnel to enter the room. If possible, keep the door locked. Ask the family members what their wishes are with regard to the brother's possessions. The chapter may offer to pack them in boxes, but the family will more likely want to do this themselves. Before they arrive, make sure any borrowed items are returned. When they arrive, have empty boxes available and offer to help. Understand that this is a difficult time for them and the family may want privacy.

The chapter will want to coordinate brothers' attendance at the funeral or memorial service. Discuss with the family or the family's clergyman the possibility of conducting the Fraternity memorial service.

In the case of serious injury or illness, find out the visitation wishes of the family and coordinate this with chapter brothers.





## *Phi Mu Delta's Comprehensive Membership Development Program*

### **THE ORACLE - NEW MEMBER ORIENTATION**

The Oracle is our orientation program by which new members learn more about Phi Mu Delta. It is the program by which New Members assume their obligations to become Brothers of the Order. Through a series of online learning modules, brotherhood building activities and interactions with initiated members and alumni, the New Member learns the basic skills required and needed to maintain a strong chapter that will assist in his development throughout his life. Phi Mu Delta mandates that the New Member Orientation program may not last more than six weeks.



Phi Mu Delta's New Member Orientation is never to be used as a "weeding" out process. The dynamic recruitment process teaches our members to only invite men into Phi Mu Delta who have already displayed the behaviors and values that we seek in a member.

### **THE PERSONALIZED MEMBERSHIP DEVELOPMENT PROGRAM (MYPMD)**

Following the New Member Orientation, members are challenged to continue their leadership and soft skills development. As such, each semester, members are required to certify themselves from a selection of skill set training modules and activities. In some cases, prerequisite training will be required before a member may run for a particular office or chairmanship. All certifications are kept in the member's permanent record and are available to assist the member when it is time to apply for graduate school or build his resume.

### **THE SENIOR YEAR EXPERIENCE**

It is essential that we prepare our membership for post college success. The Senior Year Experience Program is designed to help our members translate the skills that they have developed throughout their membership into marketable skills essential for success in life and career. Members are invited to develop mentoring relationships with local alumni throughout their Senior Year. In addition, the Phi Mu Delta National network of alumni is introduced to ensure that the member is well-connected with other members in career fields and geographical locations throughout the world. In addition, workshops and seminars are provided for resume building, interview practice and financial literacy.

## BECOMING LIONS PROGRAM

The Becoming Lions Program is designed to encourage undergraduate members to receive the most out of their fraternal experiences. It is an elite achievement for Phi Mu Delta members to strive for. To qualify for the Becoming Lions Program, the undergraduate member must complete every section of the rubric each semester he is an initiated brother. Members who excel in all areas will be recognized by the National Fraternity.



### Academic and Personal Development

- Maintain a GPA that is at or above the All Men's Average on campus
- Achieve Dean's List at least one semester
- Successfully complete an internship or study abroad program

### Leadership

- Attend Sapphire Leadership Academy (or Navigator) or Conclave
- Hold a major leadership position outside of Phi Mu Delta
- Attend the Regional Recruitment Workshop or Leadership Summit

### Civic Engagement

- Complete at least 30 hours of service each semester
- Organize one civic engagement project (once while an initiated member)



### Senior Year Project

- Implement a project designed to improve the undergraduate experience that is approved by the National Office



# Chapter Management

## *Officer Descriptions*

### **PRESIDENT**

- Serves as the official representative of the chapter
- Call to order and run all chapter meetings and executive board meetings
- Direct the chapter's strategic plan and implement needed change within the organization
- Responsible for all chapter operations
- Develop positive relationships with campus officials, alumni, undergraduate members, and all other constituents

### **VICE PRESIDENT OF MEMBERSHIP**

- Perform all of the duties of the Chapter President in the event of his absence
- Ensure that all membership related paperwork is completed and submitted in a timely manner
- Serve as the Chair of the Chapter Judicial Board
- Organize the annual Brotherhood Retreat

### **VICE PRESIDENT OF FINANCE**

- Be in charge of all financial matters for the chapter
- Serve as the Chair of the Finance committee and oversee the development of the chapter budget
- Be responsible for collecting all fees and dues
- Enforce all by-laws as they relate to the chapter treasury

### **VICE PRESIDENT OF MEMBER DEVELOPMENT**

- Serve as the Chair of the ENGAGE Committee
- Direct all activities associated with the ENGAGE program
- Ensure that the New Member Education Orientation is run in accord with the National New Member Education guidelines
- Responsible for the welfare of all members
- Provide programming that is free of hazing and enhances the brotherhood experience in a positive manner
- Oversee the assignment of Big Brothers and ensure that they are providing the support needed during the New Member Orientation program

### **VICE PRESIDENT OF ADMINISTRATION**

- Keep all the records of the chapter
- Type all meeting minutes and distribute them in a timely manner
- Maintain the chapter by-laws, constitution, and National by-laws
- Ensure that all chapter documents are kept in a safe place and readily available
- Maintain all chapter rosters and attendance records

## *Committee Structure*

Officer Position	Committees
<b>President</b>	Executive Committee
<b>VP of Membership</b>	Recruitment Judicial Social Intramurals Risk Management Ad Hoc Committees
<b>VP of Membership Development</b>	New Member Orientation Scholarship Service Activities Chaplain
<b>VP of Finance</b>	Budget Finance Audit Fundraising Philanthropy Steward
<b>VP of Administration</b>	Public Relations Technology Historian

### **WHY HAVE COMMITTEES?**

- Spreads out responsibilities
- Creates new ideas
- Creates new lines of communication
- Increases self-values of individual members
- Chapter business is carried faster and more effectively

# Chapter/Colony Standards & Accreditation Program

Each semester, chapters and colonies will submit documentation in 7 categories

Chapter Management

Scholarship

Communications

Membership &  
Recruitment

Programming

Civic Engagement

Finance

The Standards and Accreditation Program drives the annual awards given out each year from the National Fraternity. The documentation is due December 10, for the fall semester, and May 10, for the spring semester.

Above 90%: Gold Standard

80-89% Silver Standard

70-79% Bronze Standard

**If a chapter fails to reach the Bronze Standard two consecutive semester, the chapter's charter is up for revocation by the National Fraternity.**



# Officer Transition & Training Guide

Successful officer transition provides a strong platform for the continuation of all the activities, efforts and plans initiated by the outgoing officer team. This section provides the process and the resources to help outgoing officers plan and implement a strong officer training and transition program.

## **STEP 1: PRE-ELECTION ACTIVITIES**

Each officer should have (or develop) a notebook containing important materials and documents for his leadership position. Documents and resource materials used often should be kept handy in the notebook. Outgoing officers should take the time to file important historical documents. They should also clean out and/or replace other resources for the officer notebook. This is a quick check list of notebook contents and can be copied for each officer's notebook.

### **Section 1 - Governance**

- \_\_\_\_\_ Constitution
- \_\_\_\_\_ By-Laws
- \_\_\_\_\_ Organizational Policies
- \_\_\_\_\_ Standing Rules
- \_\_\_\_\_ College/University Code of Conduct
- \_\_\_\_\_ College/university statements of position on related Greek issues (i.e. hazing, risk management), academic standing, etc.
- \_\_\_\_\_ Officer Job Descriptions
- \_\_\_\_\_ Officer/Committee Reporting Structure
- \_\_\_\_\_ Other:

### **Section 2 - Agendas/Minutes**

- \_\_\_\_\_ Meeting minutes and agendas
- \_\_\_\_\_ Committee reports
- \_\_\_\_\_ Other:

### **Section 3 - Directories**

- \_\_\_\_\_ Phi Mu Delta National Council & Active Chapter Directory
- \_\_\_\_\_ Officer team addresses/phone numbers
- \_\_\_\_\_ Members' addresses/phone numbers
- \_\_\_\_\_ Other:

## Section 4 - Resources

- \_\_\_\_\_ College/University student handbook
- \_\_\_\_\_ All current forms pertinent to the office
- \_\_\_\_\_ Crisis Management procedures
- \_\_\_\_\_ Event guidelines
- \_\_\_\_\_ End of Semester Reports
- \_\_\_\_\_ Organizational Award Applications
- \_\_\_\_\_ Other:

## Section 5 - Calendar

- \_\_\_\_\_ Accurate records of activities over the past year (i.e. contracts, dates of events, successes/challenges, etc.)
- \_\_\_\_\_ Activity calendar of the past year
- \_\_\_\_\_ Current calendar of major college/university events
- \_\_\_\_\_ Blank calendar for future planning
- \_\_\_\_\_ Other:

## STEP 2: YOUR FIRST ONE-ON-ONE MEETING

- Give your cleaned out, organized notebook to new officer and explain contents.
- Explain the duties and responsibilities of the office.
- Explain the duties that go along with the office that are NOT on the officer's job description.
- Review the past year's calendar and explain programs/events.
- Read through the Constitution, explain by-laws and standing rules pertinent to your office.
- Explain forms and files that have been started over the past year.
- Review historical files.
- Review the officer's budget.
- Check supplies and materials that this office requires.
- Together, brainstorm some goals for this office.
- Discuss timelines and deadlines for this office. Discuss the importance of meeting deadlines for events/forms.
- Discuss responsibilities to the national office (forms, finances, etc.)
- Discuss relationship and responsibilities to the advisor for this office
- Explain and review additional officer resources for this office.

### STEP 3: AN INCOMING/OUTGOING COUNCIL RETREAT

Potential activities which could be held during an executive council retreat:

- Review past goals and establish new goals
- Review policies and procedures
- Discuss “Things I wish I knew before I started this position”
- Setting the calendar for new/next year as a term
- Discuss tips for maintaining an effective executive board

(After this step, the new officer should write down any questions he has of his predecessor so they can be addressed during the second one-on-one meeting.)

### STEP 4: SECOND ONE-ON-ONE MEETING

- Review Goals from the previous year
  - What is the status of these goals?
  - Which goals were completed?
  - Which goals need follow-up work?
- Set new goals and objectives
- Set a timeline for objective completion



### STEP 5: EVALUATION

Provide a written evaluation of the officer training and transition process to constantly improve upon the existing program. Some sample questions to consider include:

1. What did you value most about the officer training and transition program?
2. What did you value least about the officer training and transition program?
3. I wish we spent more time talking about...
4. I wish we spent less time talking about...
5. How well do you feel prepared for your new leadership responsibilities based on this officer training and transition program?
6. If you were to design the program all over again, what would you add and delete?
7. When I am an outgoing officer I would like for us to use the following resource people and materials.

## *Important Dates & Reports*

<b>Membership Report</b>	<b>Submitted By</b>	<b>Description</b>	<b>Directions</b>
Induction Report	VP of Membership	Begins the process of Initiation for all Inducted New Members	Due within 48 hours of the induction ritual with \$30 Induction Fee mailed to HQ immediately
Initiation Report	VP of Membership	Grants full membership to those men who have accepted their bid and have participated in the Induction Ritual.	Due with all Initiation Fees paid <b>10 days prior</b> to initiation
New Member Biography	New Members	New Member fills out after Induction Ceremony to ensure proper billing and record keeping	New Member fills out after Induction Ceremony
Chapter Accreditation Report	President	This report serves to demonstrate that the chapter/colony is operating at expected levels.	Submitted by May 15 and December 10
End of Term Report	President or VP of Membership	This report notifies the National Office of which members are graduating at the end of the term and how many men the Chapter anticipates returning for the following term. In addition, we collect important data pertaining to chapter activities	Submitted by <b>December 1 and May 1</b> ensure proper Service Fee and Insurance invoicing and roster updates for the National Office.
Chapter Advisory Board Roster	Chapter Advisor	This report details the six Chapter Advisory Board members, their positions and directory information.	Submitted by <b>October 1</b> or anytime a new Chapter Advisory Board member is added.
Officers' Roster	VP of Administration	This report details the five Executive Board members, their positions and directory information.	Due by <b>December 1</b> or anytime a new Executive Board member is elected.
President's Report	President	This report details the goals, events, challenges and successes of the Chapter for that month.	Submitted on the <b>10th day</b> of each month that the Chapter is in session

## *National Payments & Fees*

<b>Fee Type</b>	<b>How It is Calculated</b>	<b>Due Date</b>
Induction Fee	\$30 for each New Member put through the Induction Ceremony. The chapter is responsible for submitting	Immediately following the Induction Ceremony
Initiation Fee	\$300 for each initiated member, each new member is invoiced after the Induction Ceremony	2 weeks before the Initiation Ritual
Brotherhood Service Fee	The BSF is \$100/active member – including those studying abroad, on internship, or student teaching	September 7 and February 7
Chapter Service Fee	The CSF is \$600/chapter or colony, regardless of membership size	September 15 and February 7
Liability Insurance Fee	Based on the number of members expected in the fall term through the End of Term Report	October 1
Conference Registration Fee	All registration fees are announced in October, with registration opening in April. Fees are set depending on the number of members required to attend and the location of Sapphire Leadership Institute or National Conclave.	Registration opens April 1



# Budgeting Basics

## *Budgetary Steps*

### **1. DETERMINE INCOME**

This equates to the number of active members times the semesterly or yearly fee and may include a room & board fee for chapters with houses.

It is best to underestimate revenues. Plan how to raise funds and estimate this in categories such as Membership Dues, Fundraisers or Donations. Do not include fundraisers in budget projections. Thus, if the planned car wash and book sale were to fail (as fundraisers are known to do on occasion), the chapter budget would not be hurt. The chapter can then designate the revenue as desired.

### **2. DETERMINE EXPENSES**

Try to split the expenses into two categories, fixed and variable. Variable expenses are ones that change from month to month, such as electric, water, etc. Fixed expenses would be mortgage, garbage, etc.

It is best to overestimate expenses. Estimate the costs for one year. Include costs of meeting chapter standards, conference attendance, copying and printing, food, advertising, rental fees and any costs your chapter regularly incurs. See the Annual Financial Report from the previous year for more details. The total in the expenditures section should be lower than the estimated income.

### **3. DETERMINE EXPENSE AMOUNTS**

The best way to develop these numbers is by using historical data. If historical data is unavailable, take your best guess and add 10%. This will work in an error range that will hopefully make sure you do not under budget your monies. Make sure to build in a miscellaneous category for expenses that are a surprise. Budget for savings!

### **TYPICAL LINE ITEMS**

- Interfraternity Council (IFC) Dues
- New Member Dues (any fees charged in addition to the two National New Member Fees)
- Recruitment
- Philanthropy
- Social
- Formal
- Academic
- Brotherhood
- Misc.
- Long Term Savings

# Chapter Budget

Phi Mu Delta, _____ Chapter Semester Budget For Budget Period _____			
	Number of Brothers:		
	Budgeted For:	Total Minus 2	
	Current Cash Balance:		
	Savings:		
<i>Cost Type</i>	<i>Account</i>	<i>Gross Amount Added</i>	<i>Per Member Amount</i>
FIXED	Liability Insurance		
	Brotherhood Service Fee		
	IFC Dues		
	Composite		
	Conclave		
	NGLA		
	Sapphire Leadership Fee		
	Chapter Service Payment		
	Brotherhood Housing Fee		
	TOTAL FIXED COSTS		
VARIABLE	Recruitment		
	New Member Education		
	Administration		
	Housing		
	Public Relations		
	Service		
	Philanthropy		
	Programming		
	Alumni		
	Social		
	Brotherhood		
	Academic		
	Chapter Retreat		
	Formal		
	Greek Bill Payment		
	E-check/ credit card fees		
	Senior Dinner		
	TOTAL VARIABLE COSTS		
	GROSS COSTS		
	Savings		
	TOTAL COSTS		
	TOTAL DUES PER MEMBER		



Meetings should be happening regularly, with the time and place being consistent. The executive board should meet 3-4 days before the general membership meeting in order to develop and distribute the agenda.



The first meeting of every month should be a formal meeting grounded in the ritual of the National Fraternity and conducted by Chaplain. In addition to the formal meeting, the National Office recommends doing a "fun" meeting with announcements on paper and the duration of the meeting is focused on building brotherhood and fellowship within the chapter or colony.

### *Purpose of Meetings*

- Exchange information
- Solve problems
- Make decisions
- Share concerns
- Explain issues

Members should always know the basic purpose of the meeting

### *During the Meeting*

- Members should feel welcome and that their time is appreciated
- Start on time
- Take minutes
- Keep order - try to limit discussion dominators
- Explain important decisions and upcoming events
- Always end or begin by reciting the Founder's Creed as a chapter

### *After the Meeting*

- Distribute/post minutes
- Follow up with committees
- Call those who did not attend to tell them they were missed

# *Robert's Rules of Order*

## **ADDRESSING THE CHAIR**

All meetings should be conducted from the "chair" (usually the President). Members addressing the chair should refer to the presiding officer as "Brother President".

## **OBTAINING THE FLOOR**

Before a member may make a motion or speak in debate, he must obtain the "floor." To claim the floor, a member raises his hand and waits to be "recognized" by the chair. The chair will recognize the member by announcing his name or title. This member then has the floor and can stand and speak until he yields the floor by resuming his seat. While a motion is open to debate, there are three important cases where the floor should be assigned to a person who may not have been the first to rise and address the chair. These cases are:

- If the member who made the motion claims the floor and has not already spoken on the question, he is entitled to be recognized in preference to other members.
- No one is entitled to the floor a second time as long as any other member who has not yet spoken to the pending motion requests the floor.
- The chair should attempt to alternate opposite opinions on a question if he is aware of members requesting the floor which have opposing views.

## **MAKE A MOTION**

First, a member makes a motion. Though he makes a motion, he uses the word "move" to make the motion (for example: "I move to allocate...").

Another member seconds the motion by saying, "I second it" or simply, "Second." It should be noted that a second by a member merely implies that the motion should come before the meeting and not that he necessarily favors the motion. A member may second a motion because he would like to see the assembly go on record as rejecting the proposal, if he believes a vote on the motion would have such a result.

The chair then states the "question" on the motion. Neither the making nor the seconding of a motion places it before the body; only the chair can do that by this step (stating the question). When the chair has stated the question, the motion is pending and is then open to debate (providing it is a debatable motion). If the body decides to do what a motion proposes, it adopts a motion or it is carried. If it decides against the motion, it is rejected or lost.

## **AMENDING A MOTION**

The motion to amend is a motion to modify the wording (within certain limits) of a pending motion before it is acted upon. An amendment must be germane; that is, it must be closely related to or have some bearing on the subject of the motion to be amended.

A motion to amend is handled the same way as a main motion and requires a second to be considered. An amendment is adopted by a majority vote even in cases where the motion to be amended requires a 2/3 vote for adoption.

## **APPROVAL OF THE MINUTES**

At the beginning of regularly scheduled meetings, copies of minutes of the previous meeting will be distributed for study by chapter members. The chair then asks, "Are there any corrections to the minutes?" and pauses. Then the presiding officer says, "If there are no corrections (or 'no further corrections') the minutes stand approved (or 'approved as corrected')."

## **POINT OF ORDER**

When a member thinks the rules of the meeting are being violated, he may make a "point of order", thereby, calling upon the chair to make a ruling and enforce the regular rules.

A point of order:

- can be applied to any breach of the meeting's rules
- is in order when another has the floor
- does not require a second
- is not debatable unless the chair, being in doubt, submits the point to a vote of the meeting; in which case, the rules governing the debate are the same as for an appeal

## **PREVIOUS QUESTION**

The previous question is the motion used to bring the meeting to an immediate vote on the pending question. The motion for the previous question:

- takes precedence over all debatable or amendable motions to which it is applied
- can be applied to any immediately pending debatable or amendable motion
- is out of order when another has the floor
- must be seconded
- is not debatable
- is not amendable
- requires a 2/3 vote

## **POSTPONE INDEFINITELY**

A motion to postpone indefinitely is a motion that the assembly declines to take a position on the main question. Its adoption kills the main motion, at least for the duration of the session, and avoids a direct vote on the question. It is useful in disposing of a badly chosen main motion that cannot be either adopted or expressly rejected without possibly undesirable consequences. The motion to postpone indefinitely:

- is out of order when another has the floor
- must be seconded
- is debatable
- is not amended
- requires a majority vote



*Volunteers*





Some student development theories focus on the individual's growth and development and others focus on the growth and development of groups and organizations. Volunteers should use student development theories as a means to understand students, not apply a one-size-fits all approach to all students in all situations.

### *Chickering & Reisser (1993)*

This theory focuses on the identity development of an individual through seven vectors. The theorists use vectors rather than steps or stages because development and growth is a nonlinear process and individuals may revert backward depending on the situation.

#### **VECTOR 1 - DEVELOPING COMPETENCE**

The first vector consists of three masteries: intellectual competence (knowledge and developing analytical and critical thinking skills), physical and manual skills (creativity, athleticism, etc.) and interpersonal competence (communicating effectively and developing appropriate social behaviors).

#### **VECTOR 2 - MANAGING EMOTIONS**

This vector focuses on the ability to identify, understand, and control one's feelings and emotions.

#### **VECTOR 3 - MOVING THROUGH AUTONOMY TOWARD INTERDEPENDENCE**

When the individual begins to move from codependence toward interdependence and gaining an understanding of his place in the larger community.

#### **VECTOR 4 - DEVELOPING MATURE INTERPERSONAL RELATIONSHIPS**

Building on the third vector, this vector has two components: learning the appreciation of differences (involves more than negative stereotypes - it is the promotion of positive intercultural interactions) and having intimate relationships (relationships based on trust, responsibility, mutual respect, and acceptance of flaws).

#### **VECTOR 5 - ESTABLISHING IDENTITY**

This vector is the processes of developing self-acceptance and self-esteem by gaining comfort in one's appearance, gender, socioeconomic status, race, sexual orientation, etc.

## VECTOR 6 - DEVELOPING PURPOSE

This is when the individual determines his career path and discovers personal interests while maintaining relationships. The most important developmental task is the discovery of one's life calling: an activity, vocation, or field that one is both passionate about and utilizes personal skills and talents.

## VECTOR 7 - DEVELOPING IDENTITY

There are three stages within this vector that often overlap: humanizing values, personalizing values, and developing congruence. Essentially, throughout this vector, the individual will identify his values, confirm these as his own and establish congruence between personal values and those that society promotes.

### APPLICATION

This theory is not a checklist or benchmark of skills a student needs to accomplish, rather it should be used as a guide to understand the process of understanding one's identity. In Phi Mu Delta, members will develop relationships with each other based on trust, mutual respect, and common interests. Through membership in Phi Mu Delta, the members can develop purpose and identity through meaningful interactions with peers, alumni, and advisors.

## *Kohlberg's Moral Development (2005)*

There are six stages of moral development, which build upon one another as the individual gain a moral understanding and are broken down into three levels: Preconventional (Stages 1 and 2), Conventional (Stages 3 and 4), and Postconventional (Stages 5 and 6).

### Pre-conventional Level

In this level, student understands the societal rules of "good" or "bad" and "right" or "wrong" but he is motivated by punishment and reward.

#### **STAGE 1: PUNISHMENT & OBEDIENCE ORIENTATION**

The person makes choices based on the consequences of the actions. The main driver behind action is avoidance of punishment and unquestioning deference to power a not respect for an underlying moral order supported by punishment and authority.

#### **STAGE 2: THE INSTRUMENTAL RELATIVIST ORIENTATION**

interests shift to rewards rather than punishments - actions are motivated by what has the greatest benefit for me. Reciprocity is a matter of "you scratch my back and I'll scratch your", not loyalty, gratitude, or justice.

## Conventional Level

The student begins to recognize the societal expectations and his role within it. He believes he is performing the "right roles" out of loyalty to his roles.

### **STAGE 3: "GOOD BOY - NICE GIRL" ORIENTATION**

Good behaviors are what please others and what is approved of - he follows the stereotypes of what is believed to be a "good boy."

### **STAGE 4: THE "LAW AND ORDER" ORIENTATION**

The individual is oriented toward authority, fixed rules, and maintenance of the social order. Right behavior consists in doing one's duty, showing respect for authority, and maintaining the given social order for his own sake.

## Post-conventional Level

In this level, the student makes an effort to define moral values and principles that have validity and application apart from the acceptance of others.

### **STAGE 5: "GOOD BOY - NICE GIRL" ORIENTATION**

Right action tends to be defined in terms of general individual rights and standards that have been critically examined and agreed upon by the whole society.

### **STAGE 6: THE UNIVERSAL ETHICAL PRINCIPLE ORIENTATION**

Right is defined by the decision of conscience in accord with self-chosen ethical principles that appeal to logical comprehensiveness, universality, and consistency.

## APPLICATION

Volunteers will help members make moral decisions on a day-to-day basis, from risk management decisions, values based recruitment, to incongruence of values and actions in the community. In addition, the members may struggle with accountability and determining what is "right" and "wrong." Volunteers can empower members to develop moral competence and make good decisions and enforce them within the chapter or colony.

# *Sanford's Psychosocial Development Theory*

Commonly known as “challenge and support,” this theory focuses on the concepts of differentiation and integration and the dissonance associated with these. Differentiation is the process of students identifying personality characteristics and how these characteristics shape and support their individual identities and integration is the understanding of how the context of the environment either affirms or rejects one’s identity. The challenge is the when the student’s way of knowing or his expectations, are incongruent with the environment.

Through support, the student can reconcile differences and determine if he will conform or leave the environment.

## **DEVELOPMENTAL CONDITIONS**

There are three developmental conditions: readiness, challenge, and support. Readiness is the maturity and preparedness that a student brings to the experience and how students are able to move through experiences, interact with others, and manage emotions. Challenge, the second condition, is a necessary component in helping to guide students through their own development. Students must have a healthy level of challenge in order to move through the college experience in a way that prepares them for young adulthood. Support requires an environment that is conducive to student exploration of his or her own identity in a safe and encouraging way.

## **APPLICATION**

Volunteers can utilize Sanford’s model of challenge and support by having important discussions with members about their Phi Mu Delta experience, especially if a member feels incongruent with the group. In addition, as a volunteer, it is important to hold members to the standards of Phi Mu Delta Fraternity.

# *Astin's Theory of Involvement (1985)*

This theory examines how students change and develop as a result of their co-curricular involvement through three elements: a student’s inputs (demographics, background, previous experiences), his environment (the experiences a student would have during college), and outcomes (characteristics, knowledge, attitudes, beliefs and values after graduating college).

In addition to the elements, he created five assumptions about involvement.

1. Involvement requires an investment of psychosocial and physical energy.
2. Involvement is continuous and that the amount of energy invested varies from student to student
3. Aspects of involvement may be qualitative and quantitative
4. What a student gains from being involved is directly proportional to the extent to which they are involved
5. Academic performance is correlated with the involvement

## APPLICATION

Volunteers should know and recognize the importance of co-curricular involvement for students, especially within Phi Mu Delta Fraternity. Many members will be involved in multiple organizations and volunteers that work with these students should understand the investment the student has for the fraternity and other groups.

### *Tuckman's Stages of Group Development*

This theory of group development discussed these phases are all necessary and inevitable in order for groups to grow, face challenges, tackle problems, find solutions, plan work, and deliver results.

#### FORMING

There's a lot going on at this stage. Be sensitive to a new member's feelings. Support the group with historical information as a guide and share your confidence in their ability as a chapter. Team members have a lot of distraction which leads to a lack of task accomplishment.

##### GROUP FEELINGS

- Fear
- Uncertainty
- Anxiety
- Caution
- Hope
- Excitement
- Anticipation

##### GROUP BEHAVIORS

- Little gets accomplished
- Complaints about the group and where they are going
- Determining what first-steps to take

##### ISSUES TO ADDRESS

- What's the group's purpose?
- Why are we here?
- What's in it for us?
- What are we trying to accomplish?
- Do we have a leader?

#### STORMING

Because of the stage of development and lack of unity at this early stage, task completion still isn't the highest priority. Team members are communicating and are beginning to understand the motivations of one another. They are beginning to feel more comfortable about their own role in the group.

##### GROUP FEELINGS

- Overzealous
- Left out
- Pressure to accomplish work
- Jealousy of leaders

##### GROUP BEHAVIORS

- Increased competition and arguing/fighting
- Resistance to group formation
- Bids for power and control
- A pecking order is defined
- Little listening
- Trying to rely solely on personal experiences

##### ISSUES TO ADDRESS

- Who has power?
- How can we work together?
- How will I fit in on this committee?
- Will there be cliques?

## NORMING

Members will become more aware of their role in the group and discuss how people are communicating or not. They will begin to recognize when members are speaking up or need to be invited into the conversation. They are becoming more comfortable in both the roles of the leader and follower. Encourage the group to continue to notice the group dynamics and group participation level by all members.

### GROUP FEELINGS

- Pride
- Togetherness
- Sense of belonging
- Optimism
- Increased trust
- Fun

### GROUP BEHAVIORS

- Accept group norms
- Accept the quirks of the group
- Reduced emotional conflict
- Increased intimacy
- Group dynamics discussed
- Accomplish a moderate amount of work

### ISSUES TO ADDRESS

- Who are we as a team?
- Are we working well together to get to our goal?
- Can we switch roles?
- Can I lead/follow?

## PERFORMING

The work is being done and members are feeling good about their contributions to the attainment of their goals. The team is now an effective working unit in the chapter. They are close and developing stronger relationships.

### GROUP FEELINGS

- Understand strengths and weaknesses
- Commitment
- Enthusiasm
- Satisfaction with the team's progress
- Relaxed
- Confident

### GROUP BEHAVIORS

- High performance
- Diagnose and solve their own problems
- Norms for decision making are determined
- Members experience personal insights
- Constructive self-change

### ISSUES TO ADDRESS

- What are the problems & how can we solve them?
- How can we bring about change?
- What are my commitments to the group?
- How can we work together even better?



# Chapter Advisors

## GENERAL RIGHTS AND RESPONSIBILITIES OF THE ADVISORS

1. The advisor is expected to understand the purpose and objectives of the national fraternity and the chapter.
2. The advisor is expected to have or obtain knowledge about college/university policies and procedures that impact student organizations.
3. The advisor is expected to have or obtain knowledge about national fraternity policies and procedures that impact undergraduate chapters.
4. The advisor is expected to attend regular chapter meetings and functions.
5. The advisor is expected to assist in the negotiation of contractual agreements entered into by the chapter.
6. The advisor is expected to encourage members to take advantage of opportunities to enhance their leadership and group skills.
7. The advisor is expected to provide assistance in the areas of budget development, major expenditures and financial record keeping.
8. The advisor is expected to provide positive and constructive feedback and confront inappropriate behavior in members, which he deems to be detrimental to the individual and/or other members of the organization.
9. The advisor is expected to treat members as mature individuals who possess dignity, worth and self-direction.
10. The advisor has the right to a private life.
11. The advisor has the right to disagree with chapter decisions.

## *The Chapter Advisory Board*

**Role:** Provide support to the local chapter/colony

### EXPECTATIONS:

- Mentors, supports and teach students
- Models appropriate behavior and holds members accountable
- Participate in volunteer training and certification programs
- Support the local Chapter/Colony in their development
- Attend Chapter/Colony meetings as required
- Understand and enforce Phi Mu Delta policies, by-laws and resolutions
- Review and follow-through with assessment of Chapter/Colony visitation reports
- Assist in the recruitment of Chapter Advisors for Chapter Advisory Boards
- Communicate regularly with the District Governor, National Office, and campus Greek Life Office

## *The Chapter Advisor*

**Role:** Serve as the primary Advisor to the Chapter/Colony and Chair to the Chapter Advisory Board. Ensures that the Chapter leadership is supported, challenged and guided to achieve the chapter's goals.

### **EXPECTATIONS:**

- Is in regular contact with the Chapter President
- Attends Chapter meetings weekly
- Meets with the Chapter Executive Board at least twice a term
- Is present at all Chapter rituals and Initiation Ceremonies (If initiated member)
- Attends Officers' Academy

## *The Academic Advisor*

**Role:** Serve as the academic and scholarship advisor to the Chapter/Colony to ensure that the organization meets its academic goals and supports those that need improvement.

### **EXPECTATIONS:**

- Is in bi-weekly contact with the Chapter Academic Chair
- Attends, at least, one Chapter Meeting each term
- Meets with New Members at the beginning of New Member Education
- Assists members with identifying academic support mechanisms on campus
- Assists with the monitoring of members who are on Academic Probation
- Acts as a Faculty liaison to the Institution



## *The Financial Advisor*

**Role:** Serve as the financial advisor to the chapter/colony to ensure that financial operations are sound and that the budgetary goals of the chapter are achieved.

### **EXPECTATIONS:**

- Works closely with the VP of Finance to develop the chapter budget each term.
- Provides knowledge to the chapter to maintain consistent bookkeeping policies and financial accountability.
- Reviews all statements, invoices, and audits
- Ensures that the chapter is planning for future needs and maintains a proper amount of savings each term.
- Assists, when needed, with the collection of dues and other payments.

## *The Membership Education Advisor*

**Role:** Serve as the education advisor to the Vice President of Member Development to ensure that membership development and orientation programming is consistent with Phi Mu Delta's values and goals

### **EXPECTATIONS:**

- Works closely with the VP of New Member Education and help create the new member education calendar
- Helps the chapter identify areas of needed development
- Works with individual members as they seek to improve their leadership skills
- Ensures that all programs are free of hazing and promote positive personal development

## *The Recruitment Advisor*

**Role:** Serve as the recruitment advisor to ensure that the chapter meets its recruitment goals and retention of members.



### **EXPECTATIONS:**

- Work closely with the Recruitment Chair and VP of Membership to identify membership needs and growth potential
- Help chapter understand the need to maintain high enough membership to meet the chapter's goals and allow members to enjoy their experience
- Assist chapter with retention issues
- Understand and support Dynamic Recruitment methods and procedures
- Assist chapter with year-round recruitment goals and calendar

## *The Judicial Advisor*

**Role:** Serve as the advisor to the Chapter's Judicial Board and assists the Board with issues of due process and fairness.

### **EXPECTATIONS:**

- Understands the chapter's Judicial Board Procedures
- Be present at all Judicial Board hearings
- Assists the Board with recommendations for sanctions
- Serves purely as an advisor and does not vote or run the Hearing process
- Works closely with Executive Board to assist with issues of accountability within the chapter

# *Functions of an Advisor*

## **MAINTENANCE OR CUSTODIAL FUNCTIONS:**

- Ensuring budgets are properly prepared.
- Helping the officers plan the officer training and transition process.
- Serving as the institutional memory for the group and its activities. Challenging the group when they think an event is “tradition.” Do you have any “first annual” events?
- Helping the chapter officers interpret the constitution, bylaws, organizational policies and position statements.
- Attending meetings and/or communicate on a regular basis to keep up-to-date on issues and maintain relationships with the members.

## **GROUP GROWTH FUNCTIONS**

- Increasing productivity during committee and chapter meetings. Working alongside the undergraduate leader and helping them become more efficient leaders and positive role models.
- Increasing the effectiveness and self-confidence of individuals by providing constructive feedback and support.

## **PROGRAM CONTENT FUNCTIONS**

- Providing expertise in special areas such as budgeting, recruitment, ritual exemplification, program management, etc.
- Providing referrals to campus and community resource personnel.
- Suggesting program ideas when solicited.

## **PRODUCT ORIENTED FUNCTIONS**

- Helping the chapter fulfill its purpose of developing friendship, scholastic development, social skills, community service and life long membership.
- Utilizing personal leadership skills and experiences to help undergraduate leaders complete assigned tasks and responsibilities.
- Develop historical files of written materials which provide timelines, forms and suggestions for improvement for activities.



# District Governors

**Role:** To represent the National Fraternity at the district level and oversee Chapter Advisory Boards within their District.

## EXPECTATIONS

- Participate in volunteer training and certification programs
- Oversee all Chapter Advisory Boards within the District
- Visit each chapter/colony within the District at least once a year.
- Serve as lead presenter at Regional Academies
- Review and follow-through with assessment of Chapter/Colony visitation reports
- Assist in the recruitment of Chapter Advisors for Chapter Advisory Boards.
- Communicate regularly with Chapter/Colony Officers in District

### **Orange: Nu District**

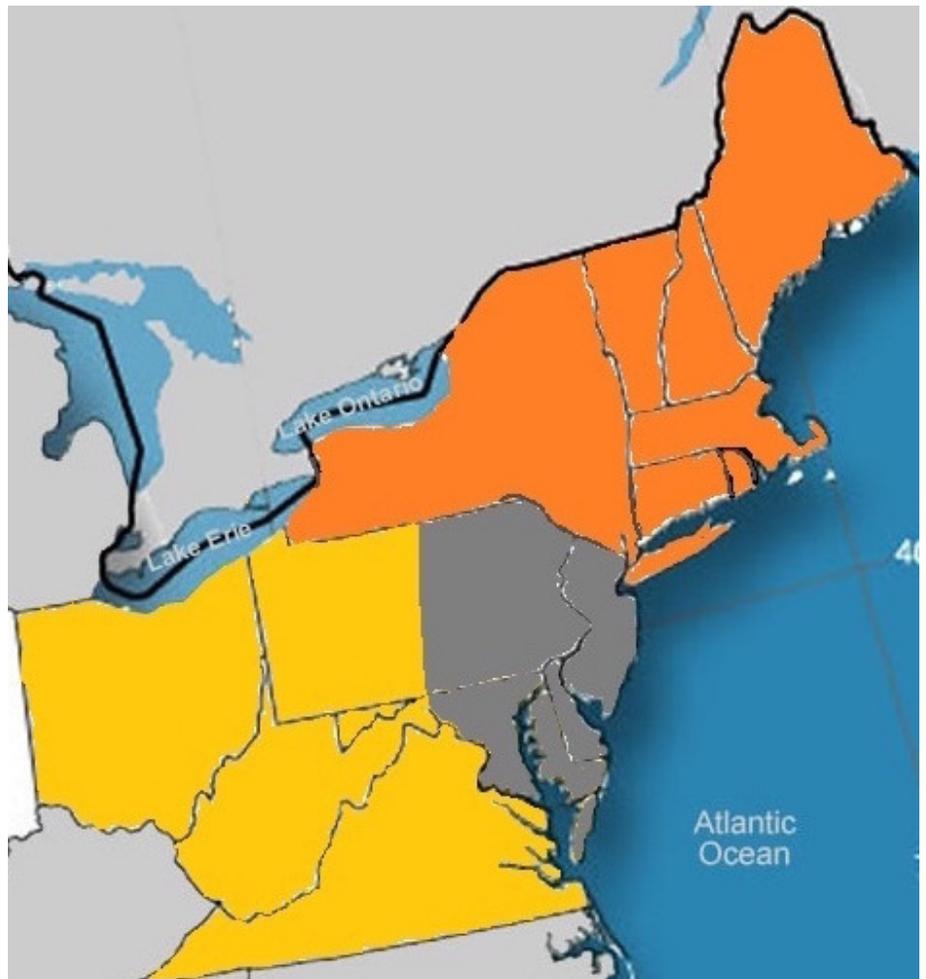
Nu Beta, Nu Gamma, Nu Eta,  
Nu Theta, Nu Pi, Nu Xi & Nu Rho

### **Grey: Eastern Mu District**

Mu Alpha, Mu Epsilon, Mu Sigma,  
Mu Tau, Mu Xi, & Mu Zeta

### **Yellow: Western Mu District & Sigma District**

Mu Beta, Mu Omicron, Mu Rho,  
Mu Theta, Mu Upsilon, &  
Sigma Alpha





## National Council

The role of the National Council of Phi Mu Delta is to establish leadership consistent with the Fraternity's Constitution and Bylaws, regarding the finances, management and activities for the further advancement of the Phi Mu Delta Fraternity. The National Council is the authority for the governance of the Fraternity. The Council delegates to the Fraternity's Executive Director for the management of operations and resources.

The ultimate role of the National Council is to assist the Fraternity's staff and volunteers in carrying out the mission and strategic plan of the fraternity.

An officer of the National Council is an integral part of the leadership team, providing direction and vision of Phi Mu Delta. He is responsible, together with the full Council, for governance and oversight of all aspect of Phi Mu Delta. Key responsibilities are governance and promoting the mission of Phi Mu Delta.

National Council Officers shall, in good faith, endeavor to meet the following responsibilities and expectations

### *Responsibilities*

- Execute the Fraternity's strategic planning process, the strategic direction and tracking progress based on pre-determined metrics with the support and participation the Fraternity's Executive Director.
- Recommend and nominate worthy alumni and undergraduate members for service on committees and projects.
- Ensure the Fraternity uses effective financial strategies.
- Ensure the protection of the Fraternity's assets and provide financial oversight:
  - Review and approve the Fraternity's annual budget.
  - Ensure adherence to all financial policies, both short and long term
  - Require transparency in financial practices.
- Ensure legal and ethical integrity of the Fraternity, its policies, practices, and operations, ensuring compliance, transparency and compliance.
- Enhance the Fraternity's public image and standing, serving as ambassadors and advocates for the Fraternity.
- When appropriate, select and terminate the Fraternity's Executive Director.
- Support the Executive Director's leadership and evaluate his or her performance annually against an agreed upon set of goals and objectives.

## *Expectations*

- Be informed of the Fraternity's vision, mission, goals, programs and services, including a working knowledge of the Fraternity's bylaws and policies.
- Be able to articulate the Fraternity's purpose, goals, strategic focus and needs.
- Attend and participate in Council meetings, conference calls and special events as needed.
- Participate in standing/ or ad-hoc committees and projects as requested by the president.
- Be effective in all Council discussions and deliberations by being prepared and familiar with advanced reading materials.
- Be an advocate of Phi Mu Delta and its members.
- Receive no compensation for your services as Officer of the National Council
- Inform the Council of any potential conflicts of interest, whether real or perceived, and abide by the decision of the Board related to the situation.
- Agree to pay your own expenses incurred in attending regular Council Meetings and Fraternity activities.
- Maintain the confidential nature of council deliberations and avoid acting as spokesperson for the entire board unless authorized to do so.
- Vote according to one's individual conviction and challenge the judgement of other when necessary, yet remain willing to support the decision of the National Council and work with fellow Council Officers in a spirit of cooperation.
- Attend the biennial Conclave.
- Support the Fraternity's fundraising efforts and make an annual gift of at least \$250.
- Agree to step down from National Council if unable to fulfill these expectations.

## *Job Descriptions*

### **PRESIDENT**

- The official representative of the National Fraternity
- Call to order and run all Council meetings
- Direct the National Council's strategic plan and direct the Executive Director to make needed change within the organization
- Develop positive relationships with campus officials, alumni, undergraduate members, and all other constituents

### **VICE PRESIDENT OF MEMBERSHIP**

- Perform all of the duties of the President in the event of his absence
- Serve as the Chair of the National Standards and Ethics Board
- Oversee all ad hoc Committees created by the National Council

## VICE PRESIDENT OF FINANCE

- Serve as the Chair of the Finance committee and oversee the development of the Fraternity Budget
- Be responsible for ensuring that proper tax paperwork and fees are paid
- Enforce all by-laws as they relate to the National treasury



## SECRETARY

- Keep all the records of the National Council
- Type all meeting minutes and distribute them in a timely manner to all constituencies
- Maintain the National Constitution and National by-laws
- Ensure that all Fraternity documents are kept in a safe place and readily available
- Maintain all meeting records and histories

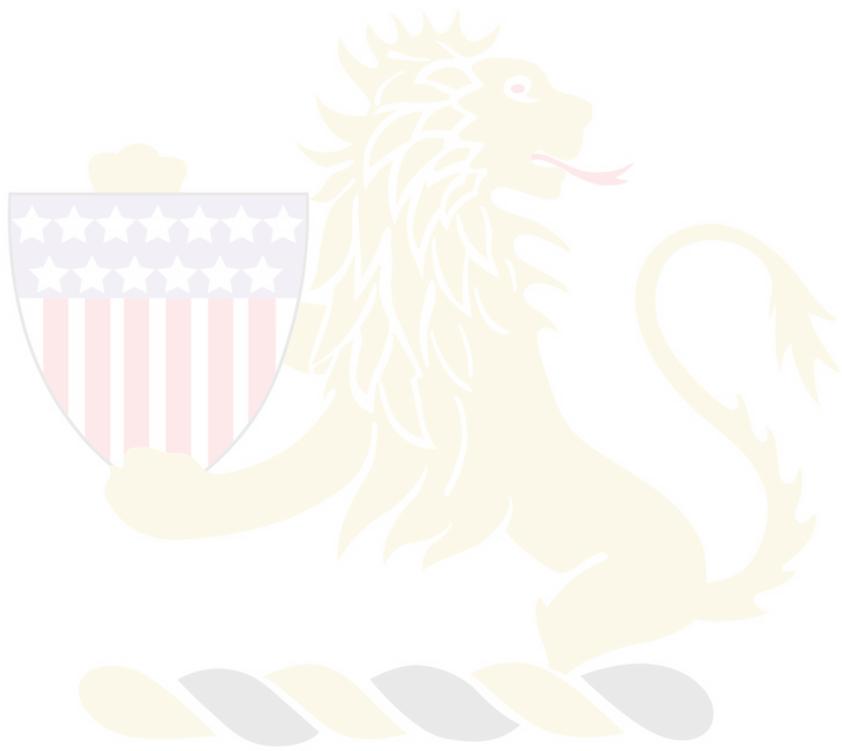
## MEMBERS-AT-LARGE

- Accept responsibilities for assignments as delegated by the National President
- Be a working member of at least one National Committee
- Make recommendations to the President for committee appointments.
- Support and provide continuity to the President's work by fulfilling the envisioned future, strategic plan, and policies established by the National Council.

## UNDERGRADUATE REPRESENTATIVES

- Attend all National Council Meetings and conference calls
- Serve as liaison between chapters & colonies concerning matters of the National Council
- Serve a term of one year on the National Council





# *Resources*





# Professional Associations

## *North-American Interfraternity Conference*

**(NIC) WWW.NICINDY.ORG**

The trade association representing 69 International and National Men's Fraternities. The NIC serves to advocate the needs of its member fraternities through enrichment of the fraternity experience; advancement and growth of the fraternity community; and enhancement of the educational mission of the host institutions.

## *Association of Fraternity/Sorority Advisors*

**(AFA) WWW.AFA1976.ORG**

AFA provides exceptional experiences, a vibrant community, and essential resources for the success of fraternity/sorority advisors. AFA has an ongoing commitment to the professional development of our members, a deep appreciation of both academic and applied research that examines the entire spectrum of the fraternity/sorority experience and the advising profession, and a commitment to collaborations within and between the higher education and interfraternal communities.

## *Northeast Greek Leadership Association*

**(NGLA) WWW.NGLA.ORG**

NGLA builds community among students from a variety of fraternal experiences, challenges members to align their actions with fraternal values, and empowers advocates to transform and improve their communities.

## *The Association of Fraternal Leadership & Values*

**(AFLV) WWW.AFLV.ORG**

AFLV exists to stimulate the growth and development of fraternity/sorority councils, chapters, and members by promoting leadership, educational, and values based experiences and resources for student leaders, their advisors, and the larger fraternal market.





# Directory

## *National Office Staff*

### **EXECUTIVE DIRECTOR**

Tom Murphy, Mu Alpha '94

609-220-4975

tom.murphy@phimudelta.org

### **DIRECTOR OF CHAPTER SERVICES AND GROWTH**

Jackie Hackett

412-443-3982

jackie.hackett@phimudelta.org

## *National Council Members*

### **PRESIDENT**

Dr. Paul Kittle, Mu Pi '90

paul.kittle@phimudelta.org

### **V.P. - MEMBERSHIP**

Joesph Doiron, Nu Theta Eta '11

joe.doiron@phimudelta.org

### **SECRETARY**

Joe Thompson, Mu Alpha '08

joe.thompson@phimudelta.org

### **V.P. - FINANCE**

David Smittle, Mu Beta '84

dave.smittle@phimudelta.org

### **MEMBERS-AT-LARGE**

Dr. Thomas Kier, Mu Beta '82

tom.kier@phimudelta.org

Ryan Grogan, Nu Beta '16

ryan.grogan@phimudelta.org

### **UNDERGRADUATE REPRESENTATIVES**

Alex Fries, Nu Beta '17

alex.fries@phimudelta.org

Mitch Larson, Mu Tau '17

mitch.larson@phimudelta.org

## *District Governors*

### **MU ALPHA, MU EPSILON, MU SIGMA, MU TAU, MU XI, & MU ZETA**

Sam Waltemeyer, Mu Omicron '09

sam.waltemeyer@phimudelta.org

### **NU BETA, NU GAMMA, NU PI, NU RHO, NU THETA, NU ETA, & NU XI**

Derrick Dubois, Nu Gamma '13

derrick.dubois@phimudelta.org

### **MU BETA, MU OMICRON, MU RHO, MU THETA, MU UPSILON, & SIGMA ALPHA**

Ronnie Brown, Sigma Alpha '14

ronnie.brown@phimudelta.org



# References

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# Resources

## *Mental Health*

### **ULIFELINE - ULIFELINE.ORG**

An anonymous, online resource center, where college students can be comfortable searching for information they need and want regarding topics such as depression, stress, anxiety, and suicide prevention.

### **THE JED FOUNDATION - JEDFOUNDATION.ORG**

An organization that works nationally to reduce the rate of suicide and the prevalence of emotional distress among college students.

### **HALF OF US - HALFOFUS.COM**

A website sponsored by mtvU and The Jed Foundation that raises awareness about the prevalence of mental health issues and connects students to the appropriate resources to get help.

## *Hazing*

### **HANK NUWER'S UNOFFICIAL CLEARINGHOUSE TO TRACK HAZING DEATHS & INCIDENTS**

<http://hazing.hanknuwer.com>

### **CAMPUSSPEAK, INC.**

<http://www.campuspeak.com/programs/hazing>

### **HAZINGPREVENTION.ORG**

### **HAZING LAW**

[www.hazinglaw.com](http://www.hazinglaw.com)

### **STOP HAZING**

[www.stophazing.org](http://www.stophazing.org)



**HUMAN RIGHTS CAMPAIGN**

[www.hrc.org](http://www.hrc.org)

**NATIONAL LGBTQ TASK FORCE**

[www.thetaskforce.org](http://www.thetaskforce.org)

**PFLAG**

[www.pflag.org](http://www.pflag.org)

**GLSEN**

[www.glsen.org](http://www.glsen.org)

**ATTICUS CIRCLE (ALLIES)**

[www.atticuscircle.org](http://www.atticuscircle.org)

**NATIONAL CENTER TRANSGENDER EQUALITY**

[www.transequality.org](http://www.transequality.org)

**CAMPUS PRIDE**

[www.campuspride.org](http://www.campuspride.org)

**CONSORTIUM OF HIGHER EDUCATION LGBT RESOURCE PROFESSIONALS**

[www.lgbtcampus.org](http://www.lgbtcampus.org)

**NATIONAL GAY AND LESBIAN CHAMBER OF COMMERCE**

[www.nglcc.org](http://www.nglcc.org)

**TRANS STUDENT EDUCATIONAL RESOURCES**

[www.transstudent.org](http://www.transstudent.org)



*Sexual Assault*

**IT'S ON US**

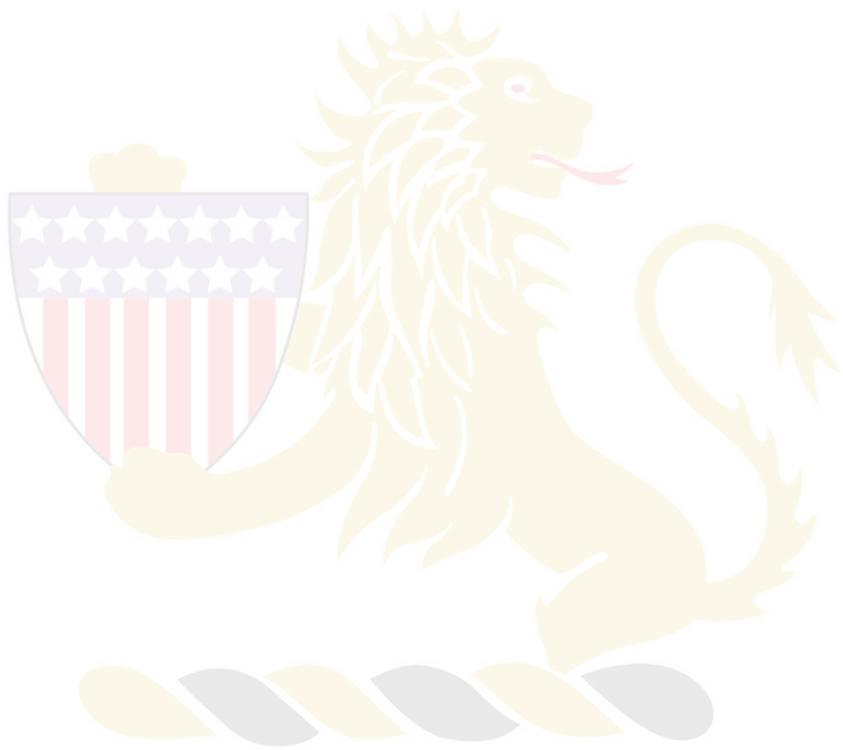
[www.itsonus.org](http://www.itsonus.org)

**NO MORE**

[www.nomore.org](http://www.nomore.org)

**RAPE, ABUSE, & INCEST, NATIONAL NETWORK (RAINN)**

[www.rainn.org](http://www.rainn.org)



# Appendix





## Phi Mu Delta National Website

The National Fraternity strives to have resources and reports accessible to members and volunteers.

# Phi Mu Delta Fraternity

- HOME
- ABOUT
- JOIN
- MEMBERS
- GET INVOLVED
- GIVE

## Chapter Officers Files & Links

- 2016 Officers' Manual** (808.02 KB)
- Officer Transition Guide** (71.07 KB)
- Chapter Directory** (512.71 KB)
- Phi Mu Delta 2016 Planner** (76.13 KB)
- National Constitution & By-Laws** (120.29 KB)
- Sample Chapter Constitution** (54.94 KB)
- Basic Membership Expectations** (33.48 KB)
- Comprehensive Academic Plan** (166.72 KB)
- Phi Mu Delta Chapter Planning Guide** (457.38 KB)
- Chairman Application** (97.89 KB)
- Phi Mu Delta Ritual Handbook** (155.11 KB)

- Forms & Reports** >>
- Payments & Fees** >>
- National Awards & Recognition** >>
- Risk Management** >>
- Leadership Development** >>
- Resources** >>
- Chapter Accreditation Program
- Chapter Officers**
- New Members
- Risk Management
- Chapter Advisors
- Recruitment

# GreekBill

GreekBill is a web-based billing and financial management service catering exclusively to the Greek Community. GreekBill's secure application enables billing, collecting, budgeting, reporting, online payment options and much more for chapters of all sizes. GreekBill was founded on the vision of providing value added financial management services to the Greek Community. We have led the industry in collection rate, customer service, satisfaction and the ability to adapt and customize solutions to meet each client's unique needs.

Since 1996, GreekBill has helped chapters, executive offices and a wide variety of Greek related companies strengthen their financial structures and streamline their operations. In fact, GreekBill was acknowledged by The Wall Street Journal as an effective option Fraternities and Sororities have used to solve their accounts receivable problems. From recruitment payment processing to national implementations, GreekBill handles it all!

GreekBill was founded on the vision of providing value added financial

management services to the Greek Community. We have led the industry in collection rate, customer service, satisfaction and the ability to adapt and customize solutions to meet each client's unique needs.

We are constantly evaluating feedback we receive from our chapters and national organizations. Feedback from national officers, advisors, chapter officers and members is key in maintaining a product that is cutting edge and ahead of the rest. Throughout the years GreekBill has added additional services and tools in order to improve our clients GreekBill experience.

Our clients' success in the financial arena has proven that GreekBill's tools and management are a vital and essential piece to all Greek organizations that plan on growing and moving forward as a top organization. To ensure this success we will continue providing innovative technology, in-depth reporting and superb customer service so that we not only service the market but define it."

The screenshot shows the GreekBill website homepage. At the top, there is a navigation bar with the GreekBill logo and links for 'About Us', 'Services', 'News', 'FAQ', and 'Contact Us'. Below the navigation bar is a large banner image of a brick building. To the right of the banner is an 'Account Login' section with fields for 'Username' and 'Password', and buttons for 'Log In' and 'Login Help'. Below the banner, there are several content blocks: 'Get a Quote' with a call to action to request a quote, 'View a Demo' with a call to action to click here to request a demo, 'Welcome to GreekBill!' featuring a testimonial from Peter Callahan, Treasurer of Sigma Alpha Epsilon, and 'News and Events' with social media links for Facebook and Twitter. The footer includes contact information, a live chat button, and a copyright notice for 1996-2016 GreekBill, Inc.

# Member Planet



## All the tools your group needs in one spot.

We appreciate that most organizations are led by volunteers, and we built memberplanet with volunteers in mind.

While your organization may have a database and perhaps some communication tools in place, we provide

you and your chapter the tools needed to engage at the local level. After all, isn't that where the real action is?

If you are looking to make better use of your time by bringing administration and communication online, or are utilizing one or more single-feature tools like Gmail, Outlook, EventBrite, Survey Monkey, Constant Contact, Excel, and PDFs, then you probably understand that while these single-feature tools are useful, they are not made to work together and do not provide a consolidated platform for member engagement .

### How does it work?

We have developed a full suite of on-line tools for engagement, fundraising, and membership management, and consolidated them onto one easy-to-use platform. A platform with enterprise-level tools that will enable your chapter to take membership management, event planning, and fundraising to the next level.

### Key Features



#### Dues Management

Collect one-time or recurring payments for memberships. New members can pay for membership dues, purchase merchandise, and make additional donations at the time they join.



#### Fundraising

Get donors engaged with an interactive Donation Site. Features include recurring donations, giving levels, photos and videos, donor tickers, supporter pages, and goal meters.



#### Event Management

Boost participation with easy Event Sites. Send email invitations, sell tickets, manage RSVPs, & more. Customize your Event Site with photos, videos, and other interactive features.



#### Mobile App

Free custom app for your local groups facilitates on-site payments, membership E-cards, and mobile communication.



#### Branded Forms & Newsletters

Easily create branded payment forms, surveys, and email newsletters. Start with a template and customize with unlimited flexible fields. View tracking and response data in real-time.



#### Broadcast

Send messages via text and/or email in just a few clicks, from a desktop or the mobile app. Use Smart Lists to instantly generate distribution lists using member data from other features.



#### Interactive Directory

Members can log on to search and contact each other directly by email and social media. Members have complete control of what information is shared and direct emails are always kept secure.



#### Smart Lists

Generate targeted distribution lists using member activity such as donor levels, membership levels, and RSVP's using status data on the system.



#### Websites

With our external website service you preserve your URL domain and have complete control over the layout and branding with the freedom to easily edit your website at any time.

# Chapter Builder



## What is ChapterBuilder?

The #1 reason people join is because of a relationship they have with your members. So we've made year-round relationships the focus of ChapterBuilder. Recruitment just got easier, friendlier, and a whole lot smarter. No more spreadsheets. ChapterBuilder brings potential new members to you, alerts you when it's time to follow up, gets all your members and advisors involved, keeps recruitment organized, and even provides real-time analytics to make your recruitment process smarter than ever!

## Get the edge over a spreadsheet.



### Leads Generator

We'll help populate your list with qualified potential new members.



### Performance Tracking

Interactive dashboard gives you personalized data that's never been available until now.



### Automated Alerts

CB is recruiting, even when you're not. You'll receive alerts from CB when it's time to follow up with PNM's.



### Virtual Coach

CB will analyze your recruitment activity and inform your leadership team so you're always performing at your highest level.



### Teamwork

CB gets everyone in the chapter involved in recruitment.



### Mobile Ready

Recruitment happens on the go. CB is mobile friendly.



### Beautiful

Design matters. Besides, you deserve something more attractive than a spreadsheet.



### Expertise

CB was designed by recruitment experts using the most current, proven methods from top performing fraternities and sororities across the world.



## National Calendar

### JANUARY

First Thursday-Saturday: Officers' Academy

### FEBRUARY

7: Brotherhood & Chapter Services fees

7: Membership Rosters due

### MARCH

10: President's Monthly Report due

TBD: Regional Leadership Summits

### APRIL

10th: President's Monthly Report due

### MAY

1st: End of Term Report due

1st: Officers' Roster due

10th: President's Monthly Report due

15th: Accreditation Report due

### SEPTEMBER

1: Officers' Roster due

TBD: Regional Recruitment Workshops

7: Brotherhood & Chapter Services fees due

7: Membership Rosters due

### OCTOBER

1st: Insurance Premium Due

10th: President's Monthly Report due

### NOVEMBER

10th: President's Monthly Report due

### DECEMBER

1st: End of Term Report due

1st: Officer's Roster due

10th: President's Monthly Report due

10th: Accreditation Report due

### SUMMER:

Even Years: National Conclave

Odd Years: Sapphire Leadership Academy & Navigator

# *National Accreditation Program Rubric*

<b>Chapter Management</b>	<b>Points Available</b>	<b>Points Earned</b>
Chapter submits and maintains an accurate Chapter Roster. <b>Rosters are due on 9/7 and 2/7.</b>	<b>10</b>	
Chapter submitted Induction Report, on time.	<b>5</b>	
Chapter submitted Initiation Report, on time.	<b>5</b>	
Chapter submitted Officers' Report, on time.	<b>5</b>	
Chapter submitted End of Term Report, on time.	<b>5</b>	
Chapter has active Judicial Board	<b>10</b>	
Chapter Advisor or designee attends weekly Executive Board or Chapter Meetings	<b>10</b>	
Chapter has not violated any Phi Mu Delta or Campus Risk Management Policies	<b>10</b>	
Chapter is actively involved on campus IFC.	<b>10</b>	
Chapter has a written New Member Orientation Syllabus	<b>10</b>	
Executive Board actively participates in at least two coaching calls with the National Office per semester. For each additional coaching call, the chapter can earn up to 10 bonus points.	<b>15</b>	
Chapter President meets regularly with campus-based Greek Advisor.	<b>10</b>	
<b>COMMENTS:</b>		

<b>Scholarship</b>	<b>Points Available</b>	<b>Points Earned</b>
Chapter Term GPA (New Members + Actives) is at, or above, the All-Men's Average on campus. (This data will be provided by your campus Greek Advisor, or their representative.)	<b>20</b>	
Chapter has developed an Academic program that has desired outcomes of improving GPAs for at-risk members and recognizes members that exceed minimum standards.	<b>20</b>	
Chapter's New Member Class GPA is at, or above, the All-Men's Average on campus.	<b>20</b>	
Chapter has an active and engaged Academic Advisor. (This data will be provided by your campus Greek Advisor, or their representative.)	<b>20</b>	
<b>COMMENTS:</b>		

<b>Communications</b>	<b>Points Available</b>	<b>Points Earned</b>
Chapter has active and up-to-date website.	<b>10</b>	
Chapter actively uses social media.	<b>10</b>	
Chapter President submits Monthly Reports, on time.	<b>10</b>	
COMMENTS:		

<b>Membership &amp; Recruitment</b>	<b>Points Available</b>	<b>Points Earned</b>
Chapter has, at least, 25 members at the beginning of the term.	<b>25</b>	
Chapter submits Recruitment Worksheet, on time.	<b>20</b>	
Chapter membership is at, or above, the average chapter size on campus.	<b>5</b>	
Chapter exceeds its recruitment goal for the term (determined by National Fraternity based on Recruitment Worksheet).	<b>10</b>	
Chapter initiates at least 90% of new members.	<b>15</b>	
COMMENTS:		

<b>Programming</b>	<b>Points Available</b>	<b>Points Earned</b>
<i>Chapters holds at least one of the following programs each term:</i>		
Leadership	<b>20</b>	
Health Awareness	<b>20</b>	
Risk Management	<b>20</b>	
Sexual Assault/Harassment	<b>20</b>	
Academics/Time Management	<b>20</b>	
COMMENTS:		

<b>Civic Engagement</b>	<b>Points Available</b>	<b>Points Earned</b>
Chapter averages 15 hours of civic engagement for each member (new members + actives) for the semester.	<b>25</b>	
Chapter hosts at least one philanthropic event to raise money for a local or regional philanthropy.	<b>10</b>	
Chapter hosts at least one philanthropic event to raise money for St. Jude.	<b>10</b>	
Chapter establishes a regular civic engagement program for the local community.	<b>10</b>	
Chapter co-sponsors at least one service project each academic year with another recognized student organization.	<b>10</b>	
COMMENTS:		

<b>Finance</b>	<b>Points Available</b>	<b>Points Earned</b>
Chapter pays all National dues on time and in full.	<b>25</b>	
Chapter ensures that all active members are up-to-date on GreekBill.	<b>10</b>	
Chapter submits budget on time. <b>Budgets are due on 9/7 and 2/7.</b>	<b>10</b>	
Chapter has a \$0.00 balance with the National Fraternity at the end of the term.	<b>20</b>	
Chapter has a savings program built into their budget.	<b>5</b>	
COMMENTS:		





Member fraternities of the North-American Interfraternity Conference agree to support and enforce the NIC Standards. They also provide education and appropriate follow up to their chapters regarding the Standards.

- Each member fraternity supports the academic success by agreeing to and requiring a:
  - Minimum 2.5 college GPA to join (2.5 high school GPA if college GPA not established)
  - Minimum 2.7 Chapter GPA annually (or above the campus all-men's average if that average is below a 2.7)
- Each member fraternity agrees to and supports Open Recruitment (ability to recruit any many at any time) and alcohol-free and drug-free recruitment activities
- Each member fraternity agrees to and supports Open Expansion (unrestricted establishment and recognition of undergraduate chapters of any member fraternity)
- Each member fraternity agrees to and supports a maximum of 12-week new member program that is alcohol-free and drug-free
- Each member fraternity has risk management policies that address alcohol, drugs, hazing, sexual abuse, harassment, and fire safety
- Each member fraternity prohibits hazing and works to eliminate it
- Each member fraternity prohibits little sister/women's auxiliary groups
- Each member fraternity shall communicate its values through its Ritual at least annually
- Each member fraternity shall communicate the importance of undergraduates participating in education programming covering any of the following: academic achievement; alcohol and drug use; career preparation; civic engagement; hazing; leadership development; sexual assault awareness/prevention; and values and ethics
- Each member fraternity has a policy that allows for the immediate, temporary suspension of a chapter in the event of an emergency
- Each member fraternity shall carry liability insurance
- Each member fraternity will report requested statistics to the NIC