



## PRESIDENT POSITION DESCRIPTION

### PURPOSE

The President shall be the executive leader of the local chapter. He manages the chapter activities of the chapter internally and serves as the face of the chapter externally. He leads the process of goal setting for the chapter, motivates members to work towards these goals, and tracks progress. The President sets the tone of the chapter and establishes group norms that influence the chapter's culture. He is a liaison between multiple entities and should communicate information across these entities.

### DUTIES

- Preside over Executive Board meetings and chapter meetings, in accordance with the Ritual Book
- Serve as the chair of Executive Board and hold officers accountable to completing responsibilities
- Oversee disciplinary action taken against members and/or local chapter, as a result of decisions made by the judicial board, Alumni Advisory Board (AAB), International Headquarters, campus and/or Interfraternity Council
- Know all legal responsibilities and obligations of the chapter and its officers
- Communicate Grand Chapter and local bylaws to all members of the chapter, and when bylaws and policies are broken, ensure accountability measures have taken place
- Communicate with Chapter Adviser, International Headquarters and campus fraternity and sorority life advisor
- Serve as the official representative of the chapter, acting as a liaison to the campus, local community, International Headquarters, and Grand Chapter
- Serve as crisis management representative on behalf of the chapter, report incident to necessary parities, and oversee completion of any remediation or disciplinary outcomes

### SKILLS/COMPETENCIES

<b>Purpose/vision/goal setting</b>	<b>Decision quality</b>	<b>Credibility</b>
<b>Manage change</b>	<b>Integrity</b>	<b>Motivate others</b>
<b>Communication</b>	<b>Adaptability</b>	<b>Balance stakeholders</b>

### RESOURCES AVAILABLE

- **Officer Portal**
  - Document Library
  - Calendar
  - Forms
- **Phi Sigma Kappa Website**
  - "Undergrads" tab
  - "About" tab > Resources
- **Phi Sigma Kappa Ritual Book**
- **First point of contact:** appointed Chapter Adviser or Alumni Advisory Board member
- **Second point of contact:** Chapter Consultant, can direct to another International Headquarters professional staff member, if needed
- **Campus-based questions/challenges:** campus fraternity and sorority life advisor



## VICE PRESIDENT POSITION DESCRIPTION

### PURPOSE

The Vice President assumes the role of second-in-command of the local chapter, behind the President, while also aiding him with pressing tasks or large projects. The Vice President is responsible for overseeing all internal affairs of the chapter. This can be done by setting goals and monitoring the progress of all chair positions in achieving their goals. The Vice President should have a thorough knowledge of the local chapter bylaw and oversees all bylaw changes.

### DUTIES

- Serve as a member of the chapter's Executive Board
- Represent the chapter at meetings or events, when the President is not available
- Serve as the chair of the Executive Board and run local chapter meetings, when President is not available
- Organize and support the chapter's committee structure and committee chairman
- Appoint committee chairs and provide charges and direction that align with chapter goals
- Host regular committee chair meetings and review local chapter bylaws
- Ensure committee chairmen are operating, accomplishing tasks, and planning events and programs that align with organizational goals and values
- Oversee the *Scholarship in Phi Sigma Kappa* program, unless otherwise delegated to another officer/chapter leader

### SKILLS/COMPETENCIES

Accountability Motivating others Decision quality	Purpose/vision/goal setting Relationship Building Direct work	Provide feedback Mentorship Attention to detail
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### RESOURCES AVAILABLE

- **Officer Portal**
  - Document Library
  - Calendar
  - Forms
- **Phi Sigma Kappa Website**
  - "Undergrads" tab
  - "About" tab > Resources
- **First point of contact:** appointed Chapter Adviser or Alumni Advisory Board member
- **Second point of contact:** Chapter Consultant, can direct to another International Headquarters professional staff member, if needed
- **Campus-based questions/challenges:** campus fraternity and sorority life advisor



## SECRETARY POSITION DESCRIPTION

### PURPOSE

The Secretary makes sure that all relevant parties are informed of the events of the local chapter, including chapter members, Executive Board and the International Headquarters. Secretaries understand the importance of clear and accurate information sharing and instill that within their work. Secretaries should have a thorough knowledge of the chapter bylaws and communicate when those bylaws are not being followed. Secretaries should have excellent and professional communication skills, as without it, the chapter will fail to function properly.

### DUTIES

- Serve as a member of the chapter's Executive Board
- Maintain an accurate local chapter roster on Officer Portal
- Take accurate chapter meeting minutes and send them out in a timely manner
- Handle communication within the chapter, ensuring all members know about upcoming events
- Have a working knowledge of Robert's Rules of Order
- Complete appropriate forms on Officer Portal, such as the Opening and Closing of School Reports
- Execute roll call at all mandatory chapter events
- Submit the chapter awards application annually
- Ensure chapter bylaws are up to date with any changes made by the chapter
- Submit chapter news to the International Headquarters to be included in publications

### SKILLS/COMPETENCIES

Communication Credibility Establish priorities	Action oriented Follow-through Timeliness	Resourcefulness Learner Organized
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### RESOURCES AVAILABLE

- **Officer Portal User Guide**
- **Chapter Meeting Minutes Template**
- **Officer Portal**
  - Document Library
  - Forms
- **Phi Sigma Kappa Website**
  - "Undergrads" tab
  - "About" tab > Resources
- **First point of contact:** appointed Chapter Adviser or Alumni Advisory Board member
- **Second point of contact:** Chapter Consultant, can direct to another International Headquarters professional staff member, if needed
- **Campus-based questions/challenges:** campus fraternity and sorority life advisor



## TREASURER POSITION DESCRIPTION

### PURPOSE

The Treasurer is responsible for maintaining the financial health of the local chapter. He should work with the chapter's Budget Committee to create and maintain an annual/semesterly budget, while also maintaining the chapter's financial accounts. The Treasurer works with his brothers to ensure that the financial responsibilities of the chapter are prioritized responsibly and met punctually. This office requires its holder to have the utmost integrity and transparency with his actions, as he is given the important task of managing the finances of the chapter.

### DUTIES

- Serve as a member of the chapter's Executive Board
- Create and oversee the chapter's Budget Committee, consisting of President, Vice President, Treasurer and Chapter Adviser, to create an annual chapter budget and discuss any proposed budget changes
- Determine dues owed by each member, based on anticipated chapter expenditures
- Be aware of any and all charges that come from International Headquarters, Interfraternity Council (IFC), or the campus, know when they are due, and remit payment on time
- Collaborate with committee chairmen to determine event budgets, and approve expenditures
- Collect fees and dues from members and hold members accountable through judicial board when dues are not paid
- Punctually file 990 forms to the IRS
- Utilize International Headquarters-recommended third-party financial services
- Work with Secretary to ensure chapter rosters are up to date before per-member billings

### SKILLS/COMPETENCIES

Accountability Integrity Establish priorities	Confidence Respect Credibility	Perspective Communication Collaboration
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### RESOURCES AVAILABLE

- LegFi/OmegaFi online budget & financial management tool
- Fees and Assessments
- Phi Sigma Kappa Accounts Receivable Policy
- File990.org
- Officer Portal
  - Dashboard for current chapter statement
  - Resources
- Phi Sigma Kappa Website
  - "Undergrads" tab
  - "About" tab > Resources
- **First point of contact:** appointed Chapter Adviser or Alumni Advisory Board member
- **Second point of contact:** Chapter Consultant, can direct to another International Headquarters professional staff member, if needed
- **Campus-based questions/challenges:** campus fraternity and sorority life advisor



## INDUCTOR POSITION DESCRIPTION

### PURPOSE

The Inductor has the responsibility of overseeing the chapter's associate member education, utilizing the *Brotherhood in Phi Sigma Kappa* program. He is responsible for clearly communicating expectations for members' involvement in the associate member process and after the Ritual for the Initiation of New Members. He should also foster a chapter culture of incorporating associate members into the chapter in a way that reflects Phi Sigma Kappa values. The Inductor serves as the main liaison between the chapter and the associate members.

### DUTIES

- Serve as a member of the chapter's Executive Board
- Develop and submit the chapter's Associate Member Education plan on Officer Portal two weeks before the start of the associate member program
- Facilitate all associate member meetings, or identify an appropriate facilitator
- Oversee the completion of all associate member requirements for initiation, including the completion of GreekLifeEdu
- Coordinate associate member activities and/or retreat
- Provide support and guidance in planning the Good Samaritan service project
- Recruit and train big brothers, and organize the big brother matching and reveal process
- Coordinate with the Sentinel to plan and execute appropriate rituals
- Hold members accountable when hazing, or other policy violations, occur involving associate members

### SKILLS/COMPETENCIES

Accountability  
Service mind-set  
Creativity

Mentorship  
Relationship building  
Adaptability

Purpose/vision/goal setting  
Resourcefulness  
Influence

### RESOURCES AVAILABLE

- *Brotherhood in Phi Sigma Kappa Inductor's Guide*
- Phi Sigma Kappa Ritual Book
- Officer Portal
  - Document Library
  - Calendar
  - Forms
- Phi Sigma Kappa Website
  - "Undergrads" tab > "Cardinal Journey", "GreekLifeEdu"
  - "About" tab > Resources
- **First point of contact:** appointed Chapter Adviser or Alumni Advisory Board member
- **Second point of contact:** Chapter Consultant, can direct to another International Headquarters professional staff member, if needed
- **Campus-based questions/challenges:** campus fraternity and sorority life advisor



## SENTINEL POSITION DESCRIPTION

### PURPOSE

The Sentinel acts as a role model of the ideals and values of Phi Sigma Kappa. Sentinels hold local chapter members accountable for their actions and provide instruction when expectations are not met. Sentinels set the stage for all chapter meetings by creating the desired atmosphere of professionalism. A working knowledge of all relevant rituals is of key importance for Sentinels, ensuring these important ceremonies are performed accurately and with dignity, and instilling the importance of our rituals into the chapter.

### DUTIES

- Serve as a member of the chapter's Executive Board
- Safeguards the local chapter's meeting space, ensuring that all persons in attendance are qualified to be there
- Oversee judicial board process, with the goal of holding members accountable for policy violations and incongruence of the values and ritual of Phi Sigma Kappa, and ensure that all probations/penalties are followed by members
- Ensures ritual equipment is in proper, working condition at all times
- Serve as sergeant at arms and maintain order during chapter meetings and rituals
- Coordinate with ritual teams and oversee practice sessions, ensuring all team members knows their roles and speaking parts
- Manage a brother-recognition process that highlights members' good work

### SKILLS/COMPETENCIES

Motivating others Conflict management Collaboration	Integrity Presence Credibility	Accountability Decision quality Influence
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### RESOURCES AVAILABLE

- **Phi Sigma Kappa Ritual Book**
- **Ritual Inventory List**
- **Officer Portal**
  - Document Library
  - Forms
- **Phi Sigma Kappa Website**
  - "Undergrads" tab
  - "About" tab > Resources
- **First point of contact:** appointed Chapter Adviser or Alumni Advisory Board member
- **Second point of contact:** Chapter Consultant, can direct to another International Headquarters professional staff member, if needed
- **Campus-based questions/challenges:** campus fraternity and sorority life advisor



## RECRUITMENT CHAIRMAN POSITION DESCRIPTION

### PURPOSE

The Recruitment Chairman should initiate and oversee all membership recruitment efforts of the local chapter. He should foster a responsibility among all members to help the chapter grow by recruiting throughout the year and provide members the resources to do. He should collaborate with chapter leaders and members to identify unique aspects of the local organization that could be appealing to potential associate members and work with the chapter to help publicize those unique qualities on campus. He should encourage members to bring in future brothers who will further the goals of the organization and live the three Cardinal Principles.

### DUTIES

- Plan and organize formal and informal recruitment events
- Create and oversee recruitment committee
- Be aware of, and educate members on, any and all campus and Grand Chapter recruitment and recruitment event policies
- Ensure all recruitment-related events are alcohol-free, per Grand Chapter and North American Interfraternity Conference (NIC) policies and hold individual members accountable for not following said policies
- Hold members accountable to attending recruitment events and recruitment trainings
- Hold recruitment training events for members to understand the importance of recruiting and how to recruit potential associate members who will be a good fit for the chapter and Phi Sigma Kappa
- Ensure ChapterBuilder is used in an ongoing manner to aide with the generation and organization of potential associate member names
- Collaborate with chapter leaders and officers to promote the organization online and on campus

### SKILLS/COMPETENCIES

Relationship building  
Motivate others  
Creativity

Action oriented  
Direct work  
Accountability

Confidence  
Purpose/vision/goal setting  
Authenticity

### RESOURCES AVAILABLE

- [ChapterBuilder](#)
- [PhiredUp's Free Online Resources](#)
- **Officer Portal**
  - Document Library
  - Calendar
  - Forms
- **Phi Sigma Kappa Website**
  - "Undergrads" tab
  - "About" tab > Resources
- **First point of contact:** appointed Chapter Adviser or Alumni Advisory Board member
- **Second point of contact:** Chapter Consultant, can direct to another International Headquarters professional staff member, if needed
- **Campus-based questions/challenges:** campus fraternity and sorority life advisor



## SCHOLARSHIP CHAIRMAN POSITION DESCRIPTION

### PURPOSE

The Scholarship Chairman should lead the local chapter and its members in their efforts To Stimulate Scholarship. He fosters an environment within the chapter that supports and celebrates academic endeavors and personal and professional enrichment. He collaborates with the judicial board and Executive Board to hold members accountable for their grades, assists members who are struggling in their academics to find ways to excel, and recognizes brothers for their academic and professional accomplishments.

### DUTIES

- Ensure chapter GPA requirements, and consequences for not meeting GPA requirements, are in local chapter bylaws and are well-known among chapter members
- Collect individual member's GPA's to ensure they meet chapter requirements
- Maintain grade records for individual members, properly disposing of them only when a member graduates or is no longer in the chapter
- Submit member, chapter, and Interfraternity Council (if applicable) grade reports to International Headquarters once per semester (Feb. 15 for previous fall semester/quarter grades; Oct. 15 for previous spring semester/quarter grades)
- Establish a scholarship plan for chapter members that includes, but is not limited to, required study hours/tables, required advising meetings or on-campus workshops, and recognition programs
- Meet with members individually who are struggling in academics and provide individual support and improvement plans
- Be knowledgeable about campus resources and share scholarship and/or leadership opportunities to chapter members
- Oversee the *Scholarship in Phi Sigma Kappa* program, unless otherwise delegated to another officer/chapter leader

### SKILLS/COMPETENCIES

Creativity  
Communication  
Resourcefulness

Mentorship  
Create trust  
Action oriented

Integrity  
Learner  
Presence

### RESOURCES AVAILABLE

- **Officer Portal**
  - Document Library
  - Calendar
  - Forms > Scholarship Report
- **Phi Sigma Kappa Website**
  - "Undergrads" tab
  - "About" tab > Resources
- **First point of contact:** appointed Chapter Adviser or Alumni Advisory Board member
- **Second point of contact:** Chapter Consultant, can direct to another International Headquarters professional staff member, if needed
- **Campus-based questions/challenges:** campus fraternity and sorority life advisor and academic success center, or campus equivalent





## RISK MANAGEMENT CHAIRMAN POSITION DESCRIPTION

### PURPOSE

The Risk Management Chairman is responsible for understanding and implementing all policies regarding risk management and member safety in the local chapter. He should either lead, or be involved in, member accountability processes within the chapter. The Risk Management Chairman is also responsible for communicating all relevant risk management policies from the campus, the Grand Chapter, the North American Interfraternity Conference (NIC), and the local Interfraternity Council (IFC). He should collaborate with other appropriate Chairmen and officers to effectively educate all members on current risk management policies. The Risk Management Chairman may also coordinate or provide educational programming to members, to help prevent harm to members and how to help brothers in the case that an incident has occurred.

### DUTIES

- Clearly understand all relevant risk management policies provided by the local campus, Grand Chapter, NIC, and local IFC
- Provide regular opportunities to educate chapter members of all relevant risk management policies
- Review event policies, processes, and event plans to ensure they are in line with risk management policies
- Coordinate Risk Awareness programming
- Know important student support resources on campus and in the local community and regularly communicate these support resources to chapter members
- Coordinate additional prevention and/or wellbeing educational opportunities for chapter members, based on chapter interest and need
- Educate members on how to handle an incident or crisis, if one should occur

### SKILLS/COMPETENCIES

Accountability  
Communication  
Collaboration

Conflict management  
Establish priorities  
Attention to detail

Integrity  
Learner  
Presence

### RESOURCES AVAILABLE

- [Holmes Murphy Resources](#)
- **Officer Portal**
  - Risk Awareness Forms
  - Document Library
  - Calendar
- **Phi Sigma Kappa Website**
  - “Undergrads” tab
  - “About” tab > Resources
- **First point of contact:** appointed Chapter Adviser or Alumni Advisory Board member
- **Second point of contact:** Chapter Consultant, can direct to another International Headquarters professional staff member, if needed
- **Campus-based questions/challenges:** campus fraternity and sorority life advisor



## OFFICER TRANSITION GUIDE

The purpose of this guide is to provide an outline of how outgoing officers can support incoming officers and chairmen and make sure they are most prepared for their upcoming term. This may be a process over a couple of weeks after officers have been elected or may be organized into a transition retreat. Either way, it will require some planning and forethought, as well as engagement from the outgoing and incoming leadership teams. Your Chapter Adviser and Alumni Advisory Board (AAB) can be a great resource in helping organize the process, as well.

### ROLE OF THE OUTGOING TEAM:

- Organize all pertinent resources and materials that you plan to hand off
- Wrap up any outstanding projects
- Inform important contacts, supporters, stakeholders that you will be leaving the position, and forward the new officer's contact information
- Identify all the things you wish you knew when starting your position, or the important things you learned in your role, and pass them on to the incoming officer
- Set aside time to connect with the new officer and provide important information, responsibilities of the role, key support resources, and any relevant documents
- Establish the best way for the new officer to contact you in the future for follow up questions

### ROLE OF THE INCOMING TEAM:

- Connect with the outgoing officer, including exchanging contact information
- Determine what you need to learn, identify all the things you would need from the outgoing officer to be successful in your new role
- Ask other people about what you may need to know or get from the outgoing officer, i.e. i.e. advisers, Chapter Consultant, other officers
- Set up times to meet with the outgoing officer and other key stakeholders and make sure it's enough time to have a thorough conversation (at least an hour)
- Establish the best way for you to contact the outgoing officer in the future for follow up questions

### ROLE OF THE CHAPTER ADVISER/AAB MEMBER:

- Provide guidance through the process
- Remind both the outgoing and incoming teams of their responsibilities during the transition process
- Help fill in any gaps or provide resources that outgoing officers cannot or do not have access to



### OFFICER NOTEBOOKS/FILES:

Each officer should maintain a notebook, binder, and/or online files with all the important resources and documents. This should be used to help each current officer keep everything organized and make it easy to hand off important materials to their successor. Today, a lot of officers use both physical notebooks or binders, as well as a digital folder (like Google Drive or Dropbox) to maintain online resources. Below is a general outline of important documents and resources that should be included in an officer notebook/binder/online file. Whether it is a physical item, a digital folder, or a combination of both, these materials are crucial to the success of an incoming officer.

#### Governance:

- Constitution, Bylaws, and policies of the local chapter and Phi Sigma Kappa Fraternity
- Officer position description
- Campus rules and policies

#### Key contacts:

- Contact information for all important advisers, fraternity/sorority office staff, International Headquarters professional staff, and other stakeholders pertinent to the officer position

#### Resources:

- Campus and local community resources
- Officer Portal support resources
- Additional Phi Sigma Kappa resources
- Any other helpful resources

#### Calendar and records:

- Calendar of the past year's events
- Sample calendar for the upcoming year
- List of important campus and Fraternity events

#### Projects/assignments:

- Information on any projects, assignments, or events the previous officer worked on during his term. This should include organized notes, calendars, schedules, outcomes and assessments of the events, projects or assignments that will be helpful for the next person.

### OUTCOMES

An intentional transition process should make the incoming leadership team feel as prepared for their new roles as possible. While a new officer can never be 100% prepared for every aspect of their role, taking the time to make sure they are starting off on the right foot is the expectation of all outgoing officers, and supports the long-term success of the chapter.



<p style="text-align: center;"><b>President</b></p> <ul style="list-style-type: none"> <li>• Gavel</li> <li>• Ritual Book</li> <li>• Campus FSL, IFC, and other important staff contact information</li> <li>• Alumni/Alumni club contact information</li> </ul>	<p style="text-align: center;"><b>Vice President</b></p> <ul style="list-style-type: none"> <li>• Chairman transition facilitation information</li> <li>• Recruitment information</li> <li>• ChapterBuilder login</li> </ul>	<p style="text-align: center;"><b>Secretary</b></p> <ul style="list-style-type: none"> <li>• Meeting minutes template</li> <li>• Social media logins</li> <li>• Officer Portal User Guide</li> </ul>
<p style="text-align: center;"><b>Treasurer</b></p> <ul style="list-style-type: none"> <li>• Bank account information and logins</li> <li>• Previous budget</li> <li>• Credit/debit cards</li> <li>• Check book</li> <li>• OmegaFi login</li> </ul>	<p style="text-align: center;"><b>Sentinel</b></p> <ul style="list-style-type: none"> <li>• <b>ALL</b> ritual equipment</li> <li>• Notes on major risk management issues</li> <li>• Risk management and prevention resources or contact information</li> </ul>	<p style="text-align: center;"><b>Inductor</b></p> <ul style="list-style-type: none"> <li>• <i>Brotherhood in Phi Sigma Kappa Inductor's Guide</i></li> <li>• Previous lesson plans</li> <li>• Contact information for guest speakers</li> <li>• Officer Portal User Guide</li> </ul>

### TRANSITION RETREAT:

In addition to individual officer transitions, it is important for the outgoing leadership team to transition to the new leadership team as a group. An effective way to facilitate this team transition is through an Officer Transition Retreat. While a retreat may serve as the main keystone of the leadership transition, it shouldn't serve as the only opportunity for the outgoing and incoming officers to connect and go over things. It is encouraged that individual incoming officers connect with their outgoing counterpart at least once before a retreat, as it can help make the retreat flow better and produce better outcomes.

#### Retreat Best Practices:

- Location: Find a space out of the house (if your chapter has one), or a space on campus, or somewhere off campus, to help reduce the potential for distractions.
- Who's involved: Generally, you'll want to make sure as many of the outgoing and incoming officers are able to come. Other important people to have join the retreat, either for the whole time or a part of the time, include the Chapter Adviser, Alumni Advisory Board members, fraternity/sorority advisor, or other chapter stakeholders, IFC representative, or an International Headquarters professional staff member, if available.
- Establish goals for the retreat: Make sure everyone knows what the intention and ultimate goal(s) of the retreat are, so they can be best prepared. This will also help frame the agenda of the retreat.
- Make an agenda: Schedule the retreat however you like, but make sure there is an agenda already prepared and distributed to attendees before the actual retreat. This will help make sure everyone comes prepared and keep the group on track throughout the retreat. A sample agenda has been provided below.



**SAMPLE RETREAT SCHEDULE:**

Time	Event	Description
10:00-12:00	Previous Executive Board Review	This time is for the previous Executive Board/chairmen to discuss some of their success stories accompanied by their areas for improvement.
12:00-1:00	Lunch	Lunch should be held in the meeting room to retain the focus of all members. Ordering delivery or utilizing campus catering can make this easier.
1:00-2:00	1 on 1 Meetings	An opportunity for the outgoing and incoming officer/chairman to share individual knowledge and advice. This time is also when the previous Executive Board Member should hand off any physical items that belong to the new Executive Board member.
2:00-3:00	SMART Goal Setting	With the advice of the previous Executive Board, chairmen, and the Chapter Adviser, the group will construct goals which follow the SMART goal system.
3:00	Previous Executive Board Dismissed	The outgoing officers are now allowed to leave.
3:00-4:00	Budget Planning	This time is for the incoming officers to construct their budget for the upcoming year.
4:00-5:00	Calendar Planning	This time is for scheduling events for the term, including chapter meetings, philanthropy, social, service, recruitment, associate member events, etc.
5:00-6:00	Action Planning	Action planning is going to consist of reviewing the SMART goals that were made earlier and constructing plans as to how the chapter can efficiently achieve their goals. The time allowed for this activity is flexible and may be shortened if other activities run long.
6:00	Conclusion and Dinner	Upon conclusion of the prescribed business above, the officers are urged to go out to dinner to bond as a new leadership team.