If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.

John Quincy Adams

Version 3.1
Updated September 2015
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The Alpha Kappa Psi Vision, Core Values and Guiding Principles should be the foundation for any chapter activity. As an officer it is important to educate other members about their significance. Let these guide you and be the foundation of decisions and discussions.

**Vision**

Alpha Kappa Psi is recognized as the premier developer of principled business leaders.

**Core Values**

Brotherhood | Trust, respect, cooperation, companionship and aid to brothers is the expected norm
Knowledge | Education and experience is emphasized and shared
Integrity | All actions, whether in business or in life, are guided by honesty, ethics and fairness
Service | Sharing of time, talent and treasure with society and our fraternity is a priority
Unity | A common understanding of our vision and values that transcends chapter, generation and profession is utilized to anticipate and create the future

**Tagline**

Alpha Kappa Psi — Shaping People, Shaping Business

**Guiding Principles**

Building Brotherhood | The esoteric quality we call "Brotherhood" is of vital importance though difficult to define. Our members, from the day they become brothers until the end of their lives, foster a great love of the fraternity and a fondness for brother members. While brotherhood manifests itself in a multitude of ways, at its center is a sense of duty and respect for both the fraternity and individual members. All activities and decisions that involve the fraternity are guided by a sense of stewardship and selflessness. Members are anchored by the need to do what is in the best interest of the fraternity as a whole and are not swayed by individual self-interest.

Lifelong Learning | College is merely the beginning of business education. Our members share their knowledge and experiences openly with the people they work with, regardless of rank or position. In addition, they seek out opportunities to share their real-world experience with brother members, and in doing so they enhance the lifelong learning of those members.

High Ethical Standards | While the business world offers many opportunities for success and advancement, it also requires us to make decisions about how we succeed. Our members understand the importance of making decisions and conducting business in a way that takes into account both legal and ethical considerations. Our members serve as role models through their consistently fair and ethical conduct.

Improving Communities | Much is expected of those to whom much is given. Business professionals who seek to improve the communities in which they do business improve lives and develop goodwill. Our members actively give back to their communities through volunteer activities and monetary support.

Enhancing the Fraternity for Life | College chapters serve as living laboratories for classroom concepts and professional conduct. In turn, lessons learned in the fraternity prepare members for success in the business world. Because they recognize the value and importance of our Fraternity, our members are united in their
passion to build a legacy for the future. They support the fraternity through volunteer leadership and monetary gifts.

Heritage Center Staff

Alpha Kappa Psi | 7801 E 88th Street :: Indianapolis, IN 46256-1233
Phone Number: (317) 872-1553 :: Fax Number: (317) 872-1567
www.akpsi.org\staff

Where do I get help? Always start with the www.akpsi.org website. Several standard questions can be found there. If the question needs to be elevated to the next level, check with your chapter advisor, section director or regional director. If they are unable to help, they will direct you properly.

Chief Executive Officer | Steve Hartman, CAE
Ext 101
Contact Steve at about:
- Operations, Fraternity & Foundation
- Staff Concerns
- Strategic Planning

Managing Director of Alumni Services and Chief Operating Officer, Alpha Kappa Psi Foundation | Jess C. LaNore, CAE, Purdue ’00-Honorary/Life
Ext 109
Contact Jess about:
- Academic Team
- Foundation Contributions
- Licensing/Trademarks
- Major Giving
- Merchandising Programs
- Planned Giving
- Scholarships
- The Diary

Managing Director of Operations | Brian D. Parker, CAE, Indiana ’93-Life
Ext 105
Contact Brian about:
- Expense Reimbursement
- Financial Statements, Fraternity & Foundation
- Liability Insurance
- MAPP
- Risk Management

Managing Director of Student Services | Jessica R. Seitz, CAE, Auburn ’02-Honorary/Life
Ext 103
Contact Jessica about:
- Academy
- Case Competition
- Certified Fraternity Volunteer (CFV)
- Chapter Advisory Board (CAB)
- Convention
- Meeting Planning
- PBLI
- Volunteer Services
**Director of Communication | Jennifer L. Adamany, San Diego '05-Life**
*Ext 106*
Contact **Jennifer** about:
- Branding
- Communication Technology
- Marketing
- Media Relations
- Publications
- Website

**Director of Communication and Information Services | Christopher W Pye, Shippensburg ‘04-Life**
*Ext 119*
Contact **Chris** about:
- Career Center (online)
- Marketing
- Project Reconnect
- Surveys (online)
- Technology
- Website

**Director of Alumni Development | Jeffery D. Hughes, South Florida ’00-Life**
*Ext 108*
Contact **Jeff** about:
- Affinity/Royalty
- Alumni Association
- Alumni Awards
- Alumni Chapter Information
- Alumni Development
- Alumni Chapter Expansion
- Alumni Listings
- Chairman’s Advisory Council
- Life Loyal Program

**Director of Education | Jason R. Pierce**
*Ext 102*
Contact **Jason** about:
- College of Leadership
- Educational Programming
- eLearning
- Event Speakers
- Officer Training
- Pledge Education Program
- RMT Training
- Road to Brotherhood
- Webinars

**Administrative Assistance for Chapter Services | Melinda Rosenthal**
*Ext 116*
Contact **Melinda** about:
- Annual Chapter Report
- Chapter Services
- Community Service
- Dean’s Council
- Recruitment
- Show Cause
- Student Awards
- Student Chapter Expansion
Chapter Educational Resource Coordinators

- Area 1: Evie Eddins, Florida State ’13 (Ext 117)
- Area 2: Cady E. Tabeling, Southern Indiana ’11-Life (Ext 113)
- Area 3: Kortney Petry, Ball State ’11 (Ext 117)
- Area 4: Liz Vickers, Stetson University ’11 (Ext 114)

Member Service Representatives

The Member Service Representatives are the "Voices of the Heritage Center." They are the customer service representatives who handle many day-to-day activities at the Heritage Center. The Member Service Reps can answer many of the general requests you may have.

Member Services | Debby Orff
Ext 110
Contact Debby about:
- Address changes
- Charters
- E-Mail Addresses
- Initiate Certificates
- Member Processing

AKPsi Marketplace/Foundation | Hazel Collier
Ext 111
Contact Hazel about:
- Address changes
- Jewelry Orders
- Merchandise Orders
- Officer Updates

Finances and Collections | Cathy Cole
Ext 112
Contact Cathy about:
- Address changes
- Chapter Account Information
- Chapter Collection Problems
- Invoice and Statement Processing

Administrative Assistance/Event Registration Services | Judy Pawlus
Ext 104
Contact Judy about:
- Address changes
- Event registrations
- Scholarship applications
Volunteer Fraternity Leadership

Fraternity Board of Directors (BOD)
The fraternity’s board of directors is composed of nine alumni members elected by the Chapter Congress for terms of three years. The board in turn elects its officers who are the chairman, vice chairman, treasurer and secretary. The responsibility of the board of directors is to set policies and procedures that will guide the fraternity into the future. It acts as the supreme governing body of the fraternity between meetings of the Chapter Congress. It is charged with approving the fraternity budget, setting annual goals of the fraternity, overseeing the performance of the CEO and, most importantly, strategic planning. In strategic planning, the board takes input from members through a variety of sources and determines the fraternity’s core values, its vision for the future, or in laymen terms — what does Alpha Kappa Psi want to be known for? Further, it is charged with the responsibility of measuring how programs assist chapters and members to reach the vision. The board is the “big picture” strategic thinker of the organization much like the board of a corporation. The chairman of the board is the highest ranking volunteer in the fraternity.

Management Team (MT)
The Management Team is the volunteer operational arm of the organization. It is composed of the fraternity president, executive vice president, four area vice presidents and 16 regional directors. The Management Team is charged with the responsibility of servicing the chapters of the fraternity within the guidelines of policies and procedures set forth by the board of directors. The Management Team also manages a vast number of fraternity alumni volunteers, such as regional managers, section directors, chapter advisors, and chapter advisory board. The fraternity president serves as the chairman of the Management Team, presides over meetings of the Chapter Congress and appoints operational committees. For a current list of officers and regional directors visit www.akpsi.org/mt.

• **The President and Executive Vice President** administer the important work of appointing, charging and monitoring committees; overseeing implementation of budgets, resource materials, and educational programs approved by the Board of Directors. The president may appoint a cabinet of volunteers for assistance (as approved by the Board of Directors).

• **The Area Vice President** is tasked with the administrative oversight of specific Regions/Regional Directors and for executing the tactical direction of Fraternity operations based on strategic guidance from the Board of Directors (BOD) while partnering with the Fraternity Staff

• **The Regional Directors** are responsible for leading and supervising their regions. They appoint regional management team members, run their regional officer training, attend conventions, and do other things that make the regional director position the undisputed toughest volunteer position in the fraternity.

Foundation Board of Directors
The Alpha Kappa Psi Foundation, founded in 1951, is a not-for-profit 501(c)(3) organization dedicated to promoting the ideals of AKPsi. Its mission is: providing resources for enhancing the educational experience of future business leaders. The governing body of the foundation is its board of directors. It is charged with the responsibility of setting polices, fundraising goals and plans, an operational budget, and the overall vision of the foundation. A professional staff oversees day-to-day activities. The foundation funds the Academy, All-AKPsi Academic Team, Case Competition award scholarships and numerous scholarships. So the fraternity can have quality speakers at its events (such as the Principled Business Leadership Institute or the College of Leadership), the foundation also underwrites expenses for many speakers through its Principled Business Leadership Fund.
Academy, Late June (all expenses paid):
The Academy is like no other Alpha Kappa Psi educational experience. It is an intimate, hands-on, challenging leadership development retreat. It is a unique program designed especially for those who demonstrate exceptional qualities for future business leaders. A limited registration cap and a remote location ensure that the experience is highly interactive. Through the generous support of Alpha Kappa Psi alumni, friends and Corporate America, the AKPsi Foundation pays all expenses for those attending the four-day experience.

Application deadline: Spring

All-AKPsi Academic Team:
The All-AKPsi Academic Team recognizes students who maintain excellence in academic standing while making positive contributions to their campus and community. The selection process measures an applicant's ability to balance the pursuit of a degree with the development of leadership skills, interactive extracurricular participation, and a sense of social responsibility. From among the team members, one or more outstanding individuals receive the Top Scholar Award and are recognized with educational grants.

Application deadline: Fall

Scholarships:
There are more than 30 scholarships available to Alpha Kappa Psi members. Some of these scholarships may have certain requirements. Visit akpsi.org for a current listing of chapter and Fraternity-wide scholarships.

Case Competition:
Through the foundation’s Case Competition, students are introduced to the realities of decision making – including incomplete information, time constraints and conflicting goals – giving them first-hand experience in analyzing business situations. The competition was designed to stimulate students’ thinking by challenging their capabilities and preparing them for future managerial decision making.

Leadership defined: Leadership is the art of mobilizing others to want to struggle for shared aspirations.
– The Student Leadership Challenge by Jim Kouzes and Barry Posner

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"I learned that a great leader is a man who has the ability to get other people to do what they don’t want to do and like it." –Harry Truman
Characteristics of a Leader
Are you a leader? Here is a brief list of leadership characteristics:

- Leaders are good teachers and great communicators.
- Leaders have stamina.
- Leaders do what they know is right, rather than what is popular.
- Leaders are good at managing time.
- Leaders do not condone incompetence, they replace it.
- Leaders are reliable and open-minded.
- Leaders are good listeners.
- Leaders act with integrity.
- Leaders inspire a vision.
- Leaders are trustworthy and able to trust others.
- Leaders subordinate their egos to the goals of the chapter.
- Leaders know how to run meetings.
- Leaders teach all members the basics of chapter operations.
- Leaders help establish realistic goals and set action plans for reaching these goals.
- Leaders successfully motivate members on the importance of reaching goals.
- Leaders recruit competent people.

Spotting Leadership Potential*
1. Future leaders show initiative and can resolve issues with minimal supervision instead of waiting around for constant direction.
2. Future leaders trust their own judgment and get on with the task at hand, taking responsibility and without fear of making mistakes.
3. Future leaders are thirsty for knowledge and seek mentors and role models as they understand there is much to learn.
4. Future leaders share their knowledge, recognizing that the more they give the more they receive in return. Knowledge hoarders do not make good leaders.
5. Future leaders accept they are not perfect and do not know everything, that they have limitations and do not know and cannot do it all. They are not afraid to show weakness.
6. Future leaders accept responsibility for their own mistakes. Taking ownership and taking risks increases the chance of error. Leaders admit, learn and move on without making excuses.
7. Future leaders take responsibility and don’t single people out or shift blame. Whilst any error is still acknowledged, it is ‘ours’ not the fault of an individual.
8. Future leaders inspire and bring out the best in others as their passion and drive are contagious and set the standard for others to aspire to.

Anyone who exhibits more than half of the traits listed above could be one of your emerging leaders and offered the training and development they need to maximize their capabilities.


"It’s a fine thing to have ability, but the ability to discover ability in others is the true test."

-Elbert Hubbard
Student leaders are not only organization leaders but also students, spouses and friends. In short, there is more to student leaders' lives than the organizations they lead. A key to balancing all the different roles student leaders must take on requires effective use of their time. The following are some brief hints on how to make the most of your time and some suggested personal characteristics of good time managers.

- **List your goals** | Start with long-term goals and then narrow down your short-term goals. Set your priorities, not only for your goals but the roles you must fulfill.
- **Make a daily “to do” list** | Set your priorities every day. This keeps you on track with your short-term and long-term goals.
  - **Start with the “A’s”** | Categorize your list into A, B and C groups, with A being the most important. Then take the items in the B group and redistribute them to the A and C groups. This way you end up with a list of only high and low priorities. However, be careful to not ignore C items; if they are forgotten about they can turn into urgent A priorities.
- **Always ask yourself …** | “What is the best use of my time right now?” Do this whenever you have a free moment.
- **Handle each item just once** | If you pick up a piece of mail or receive a note, handle it then and there. Do not set it down before you resolve it, even if that means making a note to yourself to handle it later.
- **Do it NOW** | Do not procrastinate. Remember every big project is just a lot of little projects put together. Take each element one at a time.
- **Delegate** | Give tasks to other people so they can help.

**Motivation**
How can one promote a higher level of intensity within the chapter? It’s EASY; just follow these 5-steps:

1. **Strive to create a strong sense of belonging for everyone involved in the group; the members should feel as if they are honestly needed for whom they are.**
2. **Foster discussion with the group to set clear and precise goals/objectives for the chapter and ensure progress is communicated and celebrated.**
3. **Establish a definition of what is expected of each brother so they realize the expectations others have of them.**
4. **Assign responsibilities challenging others within a range of abilities and interest. These should be responsibilities which contribute to reaching the goals/objectives.**
5. **Observe the progress of the chapter toward completing the goals/objectives.**

When motivating others, remember and understand their personal values may be different than yours. What makes sense to you may not make sense to them. By trying to see something from another person’s point of view and empowering brothers to do what they are passionate about will help the brother and the chapter grow.
Specific - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:
*Who:  Who is involved?
*What:  What do I want to accomplish?
*Where: Identify a location.
*When:  Establish a time frame.
*Which: Identify requirements and constraints.
*Why:  Specific reasons, purpose or benefits of accomplishing the goal.
EXAMPLE:  A general goal would be, "Get in shape." But a specific goal would say, "Join a health club and workout 3 days a week."

Measurable - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as......How much? How many? How will I know when it is accomplished?

Attainable - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals. You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

Realistic - To be realistic, a goal must represent an objective toward which you are both willing and able to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love. Your goal is probably realistic if you truly believe that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

Timely - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.
The following action items will ensure your term starts off on the right foot. As a chapter officer, it is important that you are familiar with all the resources available to you and the chapter. These resources include materials produced by the Fraternity and local resources (volunteers, alumni) near your chapter. The key to a successful chapter is recognizing how much you can do and when to ask for help. There are thousands of alumni and volunteers who have been in your shoes and are willing to help. Use their experiences to enhance yours!

**Action Items:**
- Read this officer manual. You must know your duties and those of your fellow officers.
- Study the chapter Bylaws.
- Review the *Board of Directors’ Statement of Policy*. Pay special attention to the Risk Management policies. All of these are essential to a healthy chapter and are each officer’s responsibility.
- Review the *Constitution* and *Statutory Code*.
- Become familiar with *Robert’s Rules of Order*.
- Review the *Ritual of Alpha Kappa Psi* (version 8 or higher).
- Know the fraternity’s vision, core values and guiding principles.
- Log-in to [www.akpsi.org](http://www.akpsi.org) to set-up a profile and become familiar with how to use the chapter reporting tools.
- Read the *Road to Brotherhood*; being familiar with it will be essential in order to properly use it as a reference tool.
- Review the *Annual Chapter Report (ACR)*. The ACR allows you to work together with the chapter advisor and Fraternity to track key components of the chapter. The ACR will help you pass on historical information and chapter data to future members, as well as set short and long-term goals.
- Contact the chapter and faculty advisors to set up personal meetings.
- Set a time for weekly executive board meetings.
- Notify the Heritage Center staff, chapter advisor and regional director of any change in officer names for communication purposes. Ensure the chapter's mailing address is current.
- Become familiar with the resources found at [www.akpsi.org](http://www.akpsi.org).
- Understand the fraternity organizational structure so you can direct your questions to the correct place.
- Have an emergency contact plan so you can contact chapter members in case of emergencies.
- Be professional – you are the role model for the chapter’s behavior.

**General Liability Insurance**

**I. INTRODUCTION**

The purpose of this manual is to give you an understanding of insurance coverage provided and information to properly report all actual and potential liability and property claims with which you may become involved. A certificate of insurance showing proof of coverage is provided with this manual. The final responsibility for the success of the insurance program rests with our fraternity and chapter. It is always important to remember that our first line of defense in liability matters is loss prevention, next is loss control, and the insurance contract is the final line of defense. The undergraduate and alumni members’ willingness to understand and assume the responsibility of sound risk management practices is a cornerstone of our program. In the event that an incident or claim does arise, the Alpha Kappa Psi Fraternity Heritage Center and Willis Insurance, will oversee the effective handling of all incident and claim investigation. An incident reporting form that must be completed and submitted at the time of any incident that results in bodily injury or property damage can be found at [www.akpsi.org](http://www.akpsi.org) in addition to a full insurance and claims manual.
II. LAWSUITS
There will be occasions when lawsuits may be served on a member of your chapter. As there is only a limited time to answer a lawsuit, the following procedure applies:
   a) Treat any potential, actual claim or lawsuit as a high priority item.
   b) Utilizing the incident reporting form, note all relevant information.
   c) Forward the suit and incident report by U.S. Postal Service Express Mail to the Alpha Kappa Psi Fraternity, Heritage Center, Attn.: Brian Parker, Managing Director of Operations.

III. GENERAL LIABILITY CLAIMS
The types of General Liability claims can be numerous and usually arise out of conditions of a chapter’s premises. They more than likely involve injury or damage to someone other than an employee or an officer of the fraternity. While on the scene, if possible, get all names, addresses and phone numbers of all parties involved, as well as any witnesses to the accident. Immediately complete the incident reporting form and submit.

IV. WHAT SHOULD BE REPORTED?
Bodily injury to anyone other than an employee and any property damage for which there is a possibility that a claim may be made against Alpha Kappa Psi Fraternity. Be sure to fully complete the enclosed incident reporting form that will provide the needed information regarding the claim. It is imperative that all losses or incidents be reported immediately to the Alpha Kappa Psi Heritage Center (See phone numbers and address on below). The Alpha Kappa Psi Fraternity Heritage Center is responsible for providing the initial report of the claim to HRH/Kirklin & Co, Inc. Once the claim report is sent to HRH/Kirklin & Co, Inc. you will likely be contacted directly by HRH/Kirklin & Co, Inc. to discuss the incident. If you are unable to obtain necessary details when first notified of any incident, still report any known facts.

V. INCIDENT/CLAIM REPORTING

<table>
<thead>
<tr>
<th>ATTN: Brian Parker</th>
<th>ATTN: Mick McGill</th>
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<tbody>
<tr>
<td>Managing Director of Operations</td>
<td>Vice President, Client Advocacy</td>
</tr>
<tr>
<td>7801 E. 88th Street</td>
<td>10707 Pacific Street, Suite 200</td>
</tr>
<tr>
<td>Indianapolis, IN 46256-1233</td>
<td>Omaha, NE 68114</td>
</tr>
<tr>
<td>(317) 872-1553 – Phone</td>
<td>(402) 898-4199 – Phone</td>
</tr>
<tr>
<td>(317) 872-1567 – Facsimile</td>
<td><a href="mailto:mmcgill@willis.com">mmcgill@willis.com</a></td>
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VI. GENERAL LIABILITY INSURANCE PROGRAM
The following description is a summary only and is not intended to serve as a substitute for the actual insurance contract. The Alpha Kappa Psi Fraternity insurance program provides Blanket Public General Liability Coverage of $1,000,000 per occurrence with a $2,000,000 general aggregate for all participating chapter and chapter house organizations. (See the end of this section for explanation of types of coverage.) The coverage is for bodily injury and property damage. This protects the local chapter, its officers and members, the house corporation and the fraternity, including appointed volunteers, from claims arising out of bodily injury and property damage occurring at the premises or at chapter functions away from the premises. It also protects against claims arising out of libel, slander, false arrest, invasion of privacy, eviction from the premises, consumption of food and beverages and incidental malpractice. It must be understood, however, that our coverage is for general public liability. It is not accident insurance covering initiated and uninitiated members for injuries sustained on the chapter premises and/or in chapter activities. Liability insurance is not a substitute for medical insurance. Further, it is not Workers’ Compensation Insurance, which may be required for chapter employees such as cooks and housemothers.

Insurer: Liberty Surplus Insurance Corporation
Policy Period: December 1, - November 30
Policy Numbers: DGLCH184369035
Adding Additional Insureds
Additional Insureds may be added to this policy. Such insureds may be your landlord, college, university and/or proprietor from whom the chapter may be renting property for a special event. **Request for an additional insured endorsement should be made in writing at least three weeks in advance of any event** and sent to Alpha Kappa Psi Fraternity Heritage Center, Attn.: Brian Parker, Managing Director of Operations, 7801 E. 88th Street, Indianapolis, IN 46256-1233. Phone (317) 872-1553, Fax (317) 872-1567. Upon approval of the request by the Alpha Kappa Psi Administrative Office and the insurance carrier Willis will issue a certificate of insurance with the original forwarded to the Additional Insured and a copy to the Heritage Center.

What Doesn’t Our Coverage Include?

i. Any claim of bodily injury and/or property damage from an incident resulting when:
   1) An illegal act was performed.
   2) An intentional act was performed.
   3) A contract made by the chapter is broken.
   4) There is any discharge, release or escape of smoke, vapors, soot, fume, acids, toxic chemicals, etc... upon land, the atmosphere of any water course or body of water.
   5) A chapter employee is hurt on the job. Each chapter with any employees must purchase Workers’ Compensation coverage locally.

ii. Any claim of property damage to property owned by, rented by, used by, or cared for by the chapter. An example, the chapter rents a portable generator for an outdoor function, and while it is in the care, custody and control of the chapter it is damaged and the lesser holds the chapter responsible and liable. No coverage is available under the Alpha Kappa Psi Fraternity liability insurance contract.

House Inspections
The insurance company has the right to make inspections and surveys at any time, give Willis Insurance and Alpha Kappa Psi Fraternity reports on the conditions that are found and recommend changes. Any inspections, surveys, reports or recommendations relate only to insurability and the premiums to be charged. Chapters and house corporations will be given advance notification of any inspections and copies of all reports.

Legal and Illegal Activity
Simply stated, no insurance policy in the world provides coverage for violations of the law. The Alpha Kappa Psi Fraternity insurance program is no exception to this rule. The key points to understand are:

- Compliance with federal, state, local and institutional (college or university) laws and regulations is required.
- Compliance with all regulations and policies of Alpha Kappa Psi Fraternity is required.

Those individuals who choose to violate these rules may void the protection for themselves under the Alpha Kappa Psi insurance program. Every effort has been made to avoid their actions from jeopardizing the other members, other entities, or other named insureds protected by the Alpha Kappa Psi program. The following brief examples are intended to provide illustration and do not represent legal advice.

i. With the broad awareness of its membership, the chapter serves alcohol to a minor in violation of the law at a chapter-sponsored function. In the event of an injury, claim or lawsuit, those persons found to be in violation of the law and/or Alpha Kappa Psi Policy (in this case the entire chapter) most likely would be without insurance protection. The other named insureds would be protected (i.e. the Fraternity, house corporation or alumni volunteers).

ii. Two of the members of a 65-man chapter cause injury to someone in connection with a hazing incident. This activity was unauthorized and done secretly without the knowledge of the chapter,
and strictly against chapter policy. In the event of an injury, claim or lawsuit, those persons (in this case, the two members) found to be in violation of the law and Alpha Kappa Psi Policy could be without insurance protection. The chapter, house corporation and other named insureds would be protected.

Great effort has been made to ensure coverage will be provided to those individuals and entities exposed to claims through no fault of their own. Chapters and chapter officers are protected from the unauthorized actions of individuals. The assets of house corporations are protected from the unauthorized actions of their chapters. Chapter Advisors are protected from the unauthorized actions of their individual chapter members and the chapter as a whole, as are the house corporations and all other appointed alumni volunteers involved with the Fraternity.

All questions regarding insurance interpretation and coverage should be directed to Willis Insurance. c/o Trude Smouse, 10707 Pacific Street, Suite 200, Omaha, NE 68114, Phone (800.736.4327, email smouset@willis.com.

**Hazing Policy**

Alpha Kappa Psi’s Hazing Policy can be found in the [Board of Director’s Statement of Policy](www.akpsi.org) and online at [www.akpsi.org](http://www.akpsi.org). It shall be the responsibility of all members of Alpha Kappa Psi Fraternity to determine college, university or other legal jurisdiction policy regarding hazing, mental or physical, and to comply totally with such policies.

**Hazing Prevention**

When organizations are challenged to eliminate hazing practices, some members are often resistant to this change. In many cases, those who are most vocal against eliminating hazing are those who are upset about the hazing they themselves endured (but don’t admit this publicly) and expect others should be “abused” as well in order to gain “true” membership in the group just like they did.

Of course, if you try to eliminate hazing in your chapter, you will likely encounter many elaborate reasons for why this will be devastating for your group. While there will be some staunch supporters of the status quo, there will be many who can be convinced of the negative effects and potential risks of hazing. Believers in the supposed “benefits” of hazing may be more likely to change their opinion if they can envision some alternatives. The following are supposed benefits hazers believe they accomplish and some alternatives you can instill in your chapter that will accomplish the same goal:

- **Foster unity:**
  - Brother retreat.
  - Visit a ropes course to work on group cohesiveness, communication and leadership skills.
  - Non drinking socials to learn about each other.
- **Develop problem-solving abilities:**
  - Have discussions about chapter weaknesses such as poor recruitment, apathy and poor scholarship, and develop solutions the chapter might then adopt (i.e. create a business plan).
  - Do groups for rituals so they can work under a deadline.
- **Teaches you to work under stress:**
  - Prepare a challenging fundraiser and see it through to the end.
  - Have an interview workshop to prepare you better for tough interviews.
- **Develop leadership skills:**
  - Encourage participation in school/campus activities outside of the chapter.
  - Encourage new members to get involved in committees and/or leadership roles.
  - Develop a peer mentor program within your group for leadership roles.
- Invite school/community/business leaders into the chapter to share their experiences.
- Instill a sense of membership:
  - Start new traditions ~ it only takes a few academic terms for it to become a tradition.

**Believe it or not:**
Chapters found responsible of hazing have been required to eliminate hazing in order to stay open as a chapter of Alpha Kappa Psi. These chapters report that eliminating hazing increased member involvement therefore reducing apathy!

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**Parliamentary Procedure**

**Basic Principle: Minority is heard but majority rules**

I. **Establish a quorum**
   A quorum is the number of people who must be present to take legal action on business matters and is essential to conducting business meetings. The quorum is stipulated in the bylaws, and before any business is discussed, the chair should establish for the record that a quorum exists.

II. **All members have equal rights**
   These include the right to make motions, debate, and vote. You need a two-thirds majority vote to deprive members of basic rights — such as closing or limiting debate and closing nominations. No member may be forced to vote, silence gives consent. General business — majority of those present

III. **Debate, decorum, and order**
   Only one main motion (one subject) may be considered at a time, and only one person may speak at a time. Anyone who wishes to make a motion should first be recognized by the chair and preface the motion with the words, “I move that.” If someone wishes to second the motion, that person does not have to wait to be recognized but merely calls out, “I second the motion.” Without a second motion, the chair moves on to the next agenda item. After the motion has been made and seconded, the chair restates the motion, which is termed a main motion. Discussion begins. To ensure order and that only one person speaks at a time, the chair recognizes members before they may speak. There must be an opportunity for at least one pro and one con for each motion and amendment. Technically, after a second is made, a motion cannot be withdrawn (not efficient to enforce).

IV. **Amendments**
   The purpose of an amendment is to change a motion already under consideration. If a member believes the right topic is being discussed but wants to modify the wording of the motion, he or she calls for an amendment. Technically, a motion may be amended, and the amendment to the motion may be amended, but no further amendments may be made. Amendments are motions, and as such, they require a second and full debate. Amendments can slightly change the main motion. Typically, if the author of the original motion agrees with the amendment it can be accepted as a “Friendly Amendment” and incorporated into the original motion without the need for debate or a vote.

V. **Closing Debate**
   A member who wishes to end debate may interrupt discussion and say “I move/call the previous question.” This motion requires a second and must receive a two-thirds majority vote. Should it receive a two-thirds majority, the chair then states, “The previous question has been called, all those in favor of the motion to...”

VI. **How to Run a Meeting**
   A. Decide how strict to be with parliamentary procedure — generally, the larger the group, the more strict you should be.
B. How will one be recognized to speak? — typically by raising your hand then being called upon by the chair. Large assemblies may have fixed microphones where lines are formed to speak.

C. Chair controls flow of meeting.
   i. Must appear unbiased, can never state an opinion on the motion before or during debate.
   ii. To be effective, must control flow of meeting by:
   iii. Quickly and decisively granting permission to speak.
   iv. Always watching that comments are being made at the appropriate times (a pro should be a pro, not a public service announcement; points of information should be questions not pros/cons). Always stop someone and ask him or her to explain his/her point if it sounds like the granted time is being appropriately used (if it sounds like someone is making a con during a point of information).
   v. Quickly and decisively making judgments on points of order.
   vi. Prompt for actions if meeting slows down (chair will entertain motion to _____ — such as close debate, open a window, consider “X”).
   vii. Don’t be afraid to take a recess if you need to clarify points or get some information.
   viii. Be quick to keep people in order (not speaking out of turn).
   ix. Don’t let debate get personal — name-calling is not allowed (try to get people to speak in the third person when referring to other people in the room and to address actions not people).

D. Use other resources — Warden, Parliamentarian, etc.

VII. Efficiency Tips
   A. Most motions can be voted on by acclamation (general consent).
   B. Use voice vote for motions. Chair’s ruling stands on results of voice vote unless “call for division” is called for, then vote count is needed.
   C. Chair cannot make motions but can offer to “entertain” a motion which may fix a particular sticking point in debate.
   D. If chair doesn’t know the answer to a “point of information,” he or she can call on someone else to answer it.

VIII. Potential Problems
   A. Noisy individual — warning from chair then warden removes.
   B. Bad environment (hot, cold) — chair can recess meeting to try remedy the situation.
   C. People speaking without being recognized — reminder from chair to wait to be recognized, if doesn’t work, warning from chair then warden removes.
   D. Debate lasting too long — “without objection, chair ends debate after two or more pro/cons.” (Two of the same back-to-back.)
   E. Meeting lasting too long — “without objection, chair rearranges agenda and will postpone consideration of certain items until next meeting.”
   F. Everyone wants to speak — in the order they raise their hands, a list is made, chair simply calls names off this list.

Adopted from Parliamentary Procedure: A Few Rules Help Keeps Order, by Kathy Gill”

“Entrepreneur Larry Wilson defined the difference between passion and drive as the difference between expressing yourself and proving yourself.” -- On Becoming a Leader By Warren G. Bennis
Here are some motions you might make, how to make them, and what to expect of the rules.

<table>
<thead>
<tr>
<th>To Do This:</th>
<th>You Say This:</th>
<th>May you interrupt the speaker?</th>
<th>Do you need a second?</th>
<th>Is it debatable?</th>
<th>Can it be amended?</th>
<th>What vote is needed?</th>
<th>Can it be reconsidered?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADJOURN MEETING</td>
<td>&quot;I move that we adjourn&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>CALL AN INTERMISSION</td>
<td>&quot;I move that we recess for...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>COMPLAIN ABOUT HEAT, NOISE ETC.</td>
<td>&quot;I rise to a question of privilege&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No (usually)</td>
</tr>
<tr>
<td>TEMPORARILY SUSPEND CONSIDERATION OF AN ISSUE</td>
<td>&quot;I move to table the motion&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>I CALL QUESTION END DEBATE AND AMENDMENTS</td>
<td>&quot;I move the previous question&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>POSTPONE DISCUSSION FOR A CERTAIN TIME</td>
<td>&quot;I move to postpone the discussion until...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>GIVE CLOSER STUDY OF SOMETHING</td>
<td>&quot;I move to refer the matter to committee&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>AMEND MOTION</td>
<td>&quot;I move to amend the motion by...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>INTRODUCE BUSINESS</td>
<td>&quot;I move that...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
</tbody>
</table>

THE MOTIONS LISTED ABOVE ARE IN ORDER OF PRECEDENCE. BELOW THERE IS NO ORDER...

<table>
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<th>Can it be reconsidered?</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROTEST BREACH OF RULES OF CONDUCT</td>
<td>&quot;I rise to a point of order.&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>4 No</td>
</tr>
<tr>
<td>VOTE ON A RULING OF THE CHAIR</td>
<td>&quot;I appeal from the chair's decision&quot;</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>SUSPEND RULES TEMPORARILY</td>
<td>&quot;I move to suspend the rules so that.&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>AVOID CONSIDERING AN IMPROPER MATTER</td>
<td>&quot;I object to consideration of this motion&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>6 No</td>
</tr>
<tr>
<td>VERIFY A VOICE VOTE BY HAVING MEMBERS STAND</td>
<td>&quot;I call for a division&quot; or &quot;Division!&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No</td>
</tr>
<tr>
<td>REQUEST INFORMATION</td>
<td>&quot;Point of information.&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No</td>
</tr>
<tr>
<td>TAKE UP A MATTER PREVIOUSLY TABLED</td>
<td>&quot;I move to take from the table...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>RECONSIDER A HASTY ACTION</td>
<td>&quot;I move to reconsider the vote on...&quot;</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>5 Yes</td>
<td>No Vote</td>
<td>No</td>
</tr>
</tbody>
</table>

NOTES:
1. Unless vote on question is not yet taken.
2. Unless the committee has already taken up the subject.
3. Only if the motion to be amended is.
4. Except in doubtful cases.
5. A majority vote in negative needed to prevent consideration of main motion.
6. Only if the main question or motion was not, in fact considered.
7. Only if motion to be reconsidered is debatable.
Being a good chapter president comes naturally to some, but others must work at it. Below is a guideline of attributes each chapter president should have to effectively lead the chapter. Never forget the chapter president should look out for the best interest of every Alpha Kappa Psi member.

- Manage the chapter
  - “Hand on Pulse” – chapter president should be in the “know”
  - Good delegation and follow-up skills
  - Assume all responsibility, accept the blame
- Impartiality - fraternity comes first
- Meetings
  - Efficient and on time – create and distribute an agenda in advance
  - Utilize committees
  - Understand parliamentary procedure, bylaws, constitution and statutory code
- Be a motivator, show enthusiasm
- Visual representative to brothers, institution, faculty, alumni
- Work with treasurer to monitor spending
- Work with executive board members to set goals
- Work with the chapter to set chapter goals
- Keep chapter advisor informed
- COMMUNICATE, COMMUNICATE, COMMUNICATE

“Actions speak louder than words, but not nearly as often.” Mark Twain

**Official Duties**

- Shall be the executive head of the chapter and shall preside over its meetings.
- Shall have the power to call special meetings when considered necessary and as allowed in the chapter Bylaws.
- Shall see the officers of the chapter discharge their duties faithfully, impartially, accurately and promptly.
- Shall enforce strict observance of the laws and policies of the fraternity.
- Shall decide points of order.
- Shall have the power to appoint any officers or committees not provided for by the laws of the fraternity or the Bylaws.
- Shall have the authority to preside over any committee of the chapter.
- Shall keep an open line of communication with the chapter members, the chapter and/or faculty advisors and the Regional Management Team.
- Shall look out for the best interest of each member.
- Shall ensure the chapter is representing the fraternity’s Vision, Core Values and Guiding Principles.
- Shall not be entitled to vote within the chapter except in the election of the convention or regional meeting delegate or alternate, in the election of officers of the chapter, in the election of candidates into membership, or in the case of a tie vote in regular chapter matters.
- Shall have such further powers and duties as may be prescribed by the laws of the fraternity.

**Procedure for Conducting Chapter Meetings**

**Opening:**
• One rap of the gavel — calls the meeting to order.
  o President and Warden determine if all members are true Alpha Kappa Psi.

• Two raps of the gavel — all brothers rise.
  o President says: "Brothers, for what purpose have we gathered?"
  o Brothers respond with: “To deliberate, to receive counsel and advice, and to study the teachings of our fraternity so that we may become better leaders.”
  o President instructs the Chaplain to invoke the blessing.

• Three raps of the gavel — all brothers be seated.

Roll call:
• Secretary reads the names of all brothers in good standing.

Reading of last chapter’s minutes:
• Generally, there is no real benefit in reading the last chapter’s minutes; as a result, a brother can make a motion to waive them. For example:
  o Any Brother: “I make a motion to waive the reading of the minutes.”
  o Another Brother: “Second”
  o President: “A motion has been made and seconded to waive the reading of the minutes. Discussion? All those in favor signify by saying ‘Aye’ Those opposed?”
  (The motion will fail or carry according to the judgment of the President.)

• Special Introductions:
  (This is where any alumnus, the chapter advisor, etc. are welcomed and introduced to the brotherhood.)

Reports from elected officers:
• Each officer will then present any relevant information pertaining to his/her office.

• Report of pledge educator: The pledge educator will present any important dates or information the pledges are required to know or have knowledge about.

Reports of standing committees (as applicable to your chapter):
• Professional
• Philanthropy
• Service
• Social
• Scholarship
• Parliamentarian/Bylaws
• Fundraising
• Athletic Directors
• Historian
• Regional Relations Directors/Inter-Chapter Liaison

Reports of special committees (as applies to your chapter):
• Homecoming
• Any others deemed for a special purpose

Unfinished business:
• At this point, if there are any motions which have been tabled from the previous chapter meeting, they will be discussed and voted upon accordingly.

New business:
• This is the time for new motions to be brought before the chapter.

Brother’s chat:
• This is your chance to voice any concerns, opinions, problems, or thoughts about Alpha Kappa Psi, chapter or anything else — good or bad.

Discussion and balloting of pledges:
Pledge chat – This occurs every chapter meeting and is a time to talk freely about pledges whether it is good, bad, or a funny story. If there are problems with a pledge the big brother usually speaks last.

Pledge evaluation - This occurs automatically after rituals or when deemed necessary. It is extremely serious and a vote must be taken to remove the pledge if a pledge is brought up. Pledges are brought up by writing their names on a piece of paper. The pledges who have been brought up are announced and pro/con discussion takes place on each pledge. Following discussion, a ballot vote is taken. Pledges should not be removed unless a prior “Pledge Action Plan” has been created and followed according to the regulations found in the Road to Brotherhood and PEP.

Reading of communications:
- If anyone has letters, phone calls or has personally met with alumni, now is the time to mention it in chapter if you wish.

Announcements:
- This is the time for brothers to announce things such as: job opportunities, rooms for rent, reminders of upcoming events, meeting times, etc.
- The President will call for an adjournment after all announcements are made and clarified. Please DO NOT make a motion to end discussion or end the chapter. Someone may not have an opportunity to speak on an important matter if you do so.

Singing of the Anthem:
- After adjournment, the brotherhood gathers in a circle holding hands using the secret grip while singing the Anthem of Alpha Kappa Psi.

Please Note:
The contents of the chapter meeting are for members only. The secretary should record discussions but not specific comments made. Business conducted should not be discussed with non-members unless previously granted permission.

Keys to Success
As the chapter’s President, your primary goal should be to lead the chapter to accomplish its mission. Alpha Kappa Psi’s vision is “Alpha Kappa Psi is recognized as the premier developer of principled business leaders.” Just as the Fraternity has a vision and strategic plan, so should your chapter.

Develop a plan
You must have a plan to guide the chapter during your term. If you do not, it is guaranteed the chapter will not make any progress.
- With the aid of the other officers, chapter advisor and Regional Management Team, create a vision of what the chapter will look like when your term concludes. Create no more than five measurable goals.
- Have each officer create three office-specific goals. These goals should help accomplish one or more of the chapter goals.
- Who will take your place as president? A chapter plan includes future leadership. Mentor a young leader to understand the challenges of leadership. He/She may become the next president.

Execute the Plan
It is your responsibility to hold others to their plans and to communicate progress to all members. To do this effectively, it is necessary to have a periodic review with each officer.
• If the chapter mission is to become reality, each officer and committee chair must support the chapter goals. Use the weekly executive committee meetings to ensure progress is being made and any delegated action items have been accomplished.

• Communicate. Ensure all members know the chapter goals and the progress being made. There are many people who can make the chapter successful. Ask for help and make sure to say “thank-you.”

**Control the Result**

As the president, you must make certain results are achieved. You must hold officers accountable and they should hold committee chairs accountable, too. Remove individuals who are not performing. There are other chapter members who will achieve the goals.

The president must lead by example. If you do not accomplish your tasks, you cannot expect others to accomplish theirs.

> “Outstanding leaders go out of their way to boost the self-esteem of their personnel. If people believe in themselves, it's amazing what they can accomplish.”
> 
> Sam Walton
Frequently Asked Questions

What due dates do I need to know?
The most accurate and up-to-date due dates for your chapter are listed on [www.akpsi.org](http://www.akpsi.org). Check out the Calendar of Chapter Due Dates for the most up-to-date calendar planning.

When are the chapter minutes due?
Within seven days of your meetings. The Executive and Chapter Minutes are to be sent to the CA, SD and RD. All minutes should be sent to chapter members with 24 hours of the meeting.

What if the chapter roster is inaccurate?
Correct it immediately by logging into the chapter reporting tools at [https://www.akpsi.org/cmt](https://www.akpsi.org/cmt). Remember your dues and insurance billings are based on your roster.

Can first-year students pledge?
There is not a minimum GPA to pledge Alpha Kappa Psi, therefore freshman can pledge. Refer to the Statutory Code (Caput II Section 6) for more information.

Is there an inactive status?
No, circumstances such as internships, co-op, student abroad, military duty or medical/extreme hardship are considered for Leave of Absence status. Special exceptions have been made for those who are extremely ill, pregnant, etc., but approval is required by your RD. These members must be reported as Leave of Absence and they are to re-affiliate (and be reported as doing so) upon their return. There are NO “social memberships,” “senior status,” etc. Leave of Absence status is different than suspension due to attendance issues and/or financial delinquency.

How can a member be removed in good standing?
Only by leaving the university; this could be because they “drop out” of school, graduate with the degree in which they pledged (even if they stay on for grad school), transfer to another school or branch of your school (more than 50 miles).

Are there any circumstances when the brother must re-affiliate?
Yes, if the brother returns to the university at which their home chapter is located to complete the degree in which they pledged. (Examples of this would include conclusion of internships, co-op, and medical leave of absence.)

What are the different membership forms?
Chapter rosters can be updated online using the Chapter Management Tools at [http://www.akpsi.org/cmt](http://www.akpsi.org/cmt). Once you update your roster online, an e-mail is automatically sent to you confirming these changes have been requested. A second email will be sent once the changes are approved by the Heritage Center. Any officer currently reported to the Heritage Center can access the Chapter Management Tools.

- **Report Pledges** – Reporting of all new pledges. Information required: Full name, address, phone, e-mail address, date of birth, expected graduation year, induction date and expected initiation date. Download the [Pledge Information Collection Form](http://www.akpsi.org/cmt) and have the pledges fill one out for easier input into the website. Due within seven business days of induction.
- **Report Initiates** - Reports your new brothers. Due within seven business days of initiation.
• **Chapter Roster Management** – Report status changes (graduating seniors, suspended brothers, leave of absences) and officer changes (incoming and outgoing officers; must be one of seven positions found in the *Constitution*; President, VP of Membership, VP of Admin, VP of Alumni Relations, Treasurer, Secretary, and MOR). A reason must be given for each suspension and Leave of Absence.

• **Member Reinstatement Form** – Reports brothers reinstated from temporary removal; also used to report affiliation of a brother who transfers from one university to another and joins the chapter.

**Can a brother resign from the fraternity?**
The membership of a member of the fraternity shall terminate upon the receipt of the member’s written resignation by the CEO of the fraternity or upon the member’s death. Any resignation does not relieve the member of any obligation incurred or commitments made before the resignation. (*Constitution, Article II, Section 8D*). Chapters cannot resign their members, members can only resign themselves.

A brother who resigns cannot attend any fraternity meetings, rituals or events and should not refer to his or her former membership or fraternity experiences in any document, such as résumés, employment applications, or job interviews.

**Can a chapter purchase alcohol?**
It cannot! See the risk management policies in the *Board of Directors Statement of Policy*.

**What is the chapter’s fiscal year?**
Per the *Constitution and Statutory Code* each chapter shall follow the fiscal year of April 1 – March 31. NO EXCEPTIONS.

**What is an audit and when should it be done?**
It is a review of all income and expenses and serves to ensure to the chapter, the outgoing treasurer and the incoming treasurer all funds have all been properly accounted for and any questions are resolved in a timely fashion. It should be done at the end of the treasurer’s term by the audit committee, should not include the treasurer and preferably will include at least one faculty/alumnus/CPA. A copy of the chapter audit is due to the Heritage Center by May 31 of each year after the conclusion of the chapter fiscal year (March 31). Chapters are encouraged to reference the *Chapter Audit Manual* for assistance.

**What are officer evaluations and when should they be done?**
Officer evaluations are an opportunity for the brothers to give the officers of the chapter feedback and constructive criticism on themselves in several categories. Some chapters do this once an academic term (after the first third of the term); others do it twice an academic term (at the 1/3 point and at the 2/3 point). It should be stressed that this is not personal and should be used as an anonymous way to help each officer grow and develop on a professional level. A sample officer evaluation can be found in the *Road to Brotherhood*.

**What is an incident report and when do I send one?**
An incident report is filled out whenever a negative event occurs, especially one which could result in legal issues, whether a lawsuit or police or judicial action. Examples are anytime the “authorities” (police, ambulance, Univ., etc.) are involved. Even if you think it will “go away,” you should document it! Always consult with the RMT if there is even a question. When in doubt write it out! Incident forms can be found online in the *Insurance and Claims Manual*.

**How do I know who to send copies to?**
Anything sent to the Heritage Center should be copied to the RMT. Most items will be sent to CA, SD and RD.
What is a Judicial Review Board?
The purpose of the Judicial Review Board is to create a mechanism by which effective and efficient disciplinary action may be taken against brothers or pledges of the chapter in a timely fashion. This provision is not intended and shall not, at any time, circumvent any of the rights and privileges granted to the same by the Bylaws, the Constitution and Statutory Code or the Board of Directors Statement of Policy of Alpha Kappa Psi.

MISSION: The Judicial Review Board may review any action by, of, or between pledge(s), brother(s), and their guest(s) (for those actions they will be held accountable) which may be considered inappropriate behavior, detrimental to the reputation of Alpha Kappa Psi and this chapter, or endangers the continuous smooth operations of this chapter. The Judicial Review Board ensures that a complete and thorough investigation is conducted, establishing the validity of the charges, and, if valid, the guilt or innocence of the accused and establishing an equitable punishment in the case of the former.

The Judicial Review Board is a formal remedy for serious or severe grievances against members of Alpha Kappa Psi. Any personal or minor problems can usually be settled through more informal channels. The Judicial Review Board is also responsible for hearing appeals by members who have been fined for any reason. The Judicial Review Board is encouraged to contact the Fraternity Judiciary Committee with any questions or uncertainties.

The Judicial Review Board should not need to be utilized more than a few times an academic term. If the Judicial Review Board is being utilized too frequently this is an indication of deeper problems within the chapter and the Judiciary Committee should be consulted.

Anytime the Judicial Review Board conducts an investigation it is to fill out an Investigation Report Form found online and submit it to the Judiciary Committee. Anytime an investigation is due to an alleged violation of a risk management policy (hazing, alcohol or sexual harassment) the chapter must forward this information onto the Judiciary Committee for final review and ruling.

For more information on Judicial Review Boards, see the Judiciary Committee Operations Manual found online at www.akpsi.org.

Where can I go to get additional education?
Additional education is available through webinars and eLearnings on www.akpsi.org. They offer an opportunity to supplement your programming schedule with topics that are more difficult to find locally. The webinar schedule and topics change each academic year. For the most current schedule and to register go to https://www.akpsi.org/webinars.

All webinars are recorded and placed in the webinar library which you can access at any time here. Simply go to www.akpis.org/webrecordings to find a topic!

All eLearning programs can be found here: www.akpsi.org/elearning.
Here are some common words and abbreviations used in Alpha Kappa Psi:

- **ACR**: Annual Chapter Report: chapter operations reporting tool
- **AVP**: Area Vice President: Leads an Area of AKPsi
- **BOD**: Board of Directors: group within fraternity responsible for setting policy and fraternity direction
- **BoDSoP**: Board of Directors Statement of Policy
- **CA**: Chapter advisor: An alumnus member who guides a chapter
- **CAB**: Chapter Advisory Board; smaller time commitment positions in specialty areas (recruitment, finance, etc.), under the direction of a chapter advisor and assist one specific chapter
- **CoL**: College of Leadership: held jointly with Convention
- **EVP**: Executive Vice President: assists the president
- **FA**: Faculty advisor: faculty member that guides a chapter
- **HC**: Heritage Center: central office for the fraternity, foundation and paid staff members
- **Induction**: Ceremony to become a pledge
- **Initiation**: Ceremony to become a brother
- **JC**: Judiciary Committee: reviews issues as related to the risk management policies on behalf of the fraternity
- **JRB**: Judicial Review Board: reviews membership issues within a chapter as pertains to rules and regulations
- **MT**: Management Team: consists of the president, executive vice president and 13 regional directors
- **OT**: Officer Training
- **PBLI**: Principled Business Leadership Institute
- **PEP**: Pledge Education Program: The only approved pledge program of the fraternity
- **RD**: Regional Director: oversees the chapters and volunteers within their region
- **RMT**: Regional Management Team: consists of CAs, FAs, SDs, regional managers and RD
- **RTB — Road to Brotherhood**: comprehensive membership program following the lifecycle of a brother from recruit to alumni
- **SD**: Section Director: oversees chapters within a portion of a region
- **YRS**: Yellow Rose Society: student giving program sponsored by the Alpha Kappa Psi Foundation
If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.
John Quincy Adams
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The Alpha Kappa Psi Vision, Core Values and Guiding Principles should be the foundation for any chapter activity. As an officer it is important to educate other members about their significance. Let these guide you and be the foundation of decisions and discussions.

**Vision**
Alpha Kappa Psi is recognized as the premier developer of principled business leaders.

**Core Values**
- **Brotherhood**: Trust, respect, cooperation, companionship and aid to brothers is the expected norm.
- **Knowledge**: Education and experience is emphasized and shared.
- **Integrity**: All actions, whether in business or in life, are guided by honesty, ethics and fairness.
- **Service**: Sharing of time, talent and treasure with society and our fraternity is a priority.
- **Unity**: A common understanding of our vision and values that transcends chapter, generation and profession is utilized to anticipate and create the future.

**Tagline**
Alpha Kappa Psi — Shaping People, Shaping Business

**Guiding Principles**
- **Building Brotherhood**: The esoteric quality we call "Brotherhood" is of vital importance though difficult to define. Our members, from the day they become brothers until the end of their lives, foster a great love of the fraternity and a fondness for brother members. While brotherhood manifests itself in a multitude of ways, at its center is a sense of duty and respect for both the fraternity and individual members. All activities and decisions that involve the fraternity are guided by a sense of stewardship and selflessness. Members are anchored by the need to do what is in the best interest of the fraternity as a whole and are not swayed by individual self-interest.

- **Lifelong Learning**: College is merely the beginning of business education. Our members share their knowledge and experiences openly with the people they work with, regardless of rank or position. In addition, they seek out opportunities to share their real-world experience with brother members, and in doing so they enhance the lifelong learning of those members.

- **High Ethical Standards**: While the business world offers many opportunities for success and advancement, it also requires us to make decisions about how we succeed. Our members understand the importance of making decisions and conducting business in a way that takes into account both legal and ethical considerations. Our members serve as role models through their consistently fair and ethical conduct.

- **Improving Communities**: Much is expected of those to whom much is given. Business professionals who seek to improve the communities in which they do business improve lives and develop goodwill. Our members actively give back to their communities through volunteer activities and monetary support.

- **Enhancing the Fraternity for Life**: College chapters serve as living laboratories for classroom concepts and professional conduct. In turn, lessons learned in the fraternity prepare members for success in the business world. Because they recognize the value and importance of our Fraternity, our members are united in their
passion to build a legacy for the future. They support the fraternity through volunteer leadership and monetary gifts.

**Heritage Center Staff**

**Alpha Kappa Psi** | 7801 E 88th Street :: Indianapolis, IN 46256-1233  
Phone Number: (317) 872-1553 :: Fax Number: (317) 872-1567  
[www.akpsi.org](http://www.akpsi.org)\-staff

**Where do I get help?** Always start with the [www.akpsi.org](http://www.akpsi.org) website. Several standard questions can be found there. If the question needs to be elevated to the next level, check with your chapter advisor, section director or regional director. If they are unable to help, they will direct you properly.

**Chief Executive Officer | Steve Hartman, CAE**  
*Ext 101*  
Contact Steve at about:  
- Operations, Fraternity & Foundation  
- Staff Concerns  
- Strategic Planning

**Managing Director of Alumni Services and Chief Operating Officer, Alpha Kappa Psi Foundation | Jess C. LaNore, CAE, Purdue ’00-Honorary/Life**  
*Ext 109*  
Contact Jess about:  
- Academic Team  
- Foundation Contributions  
- Licensing/Trademarks  
- Major Giving  
- Merchandising Programs  
- Planned Giving  
- Scholarships  
- The Diary

**Managing Director of Operations | Brian D. Parker, CAE, Indiana ’93-Life**  
*Ext 105*  
Contact Brian about:  
- Expense Reimbursement  
- Financial Statements, Fraternity & Foundation  
- Liability Insurance  
- MAPP  
- Risk Management

**Managing Director of Student Services | Jessica R. Seitz, CAE, Auburn ’02-Honorary/Life**  
*Ext 103*  
Contact Jessica about:  
- Academy  
- Case Competition  
- Certified Fraternity Volunteer (CFV)  
- Chapter Advisory Board (CAB)  
- Convention  
- Meeting Planning  
- PBLI  
- Volunteer Services
Director of Communication | Jennifer L. Adamany, San Diego ’05-Life
Ext 106
Contact Jennifer about:
  • Branding
  • Communication Technology
  • Marketing
  • Media Relations
  • Publications
  • Website

Director of Communication and Information Services | Christopher W Pye, Shippensburg ’04-Life
Ext 119
Contact Chris about:
  • Career Center (online)
  • Marketing
  • Project Reconnect
  • Surveys (online)
  • Technology
  • Website

Director of Alumni Development | Jeffery D. Hughes, South Florida ’00-Life
Ext 108
Contact Jeff about:
  • Affinity/Royalty
  • Alumni Association
  • Alumni Awards
  • Alumni Chapter Information
  • Alumni Chapter Expansion
  • Alumni Listings
  • Chairman’s Advisory Council
  • Life Loyal Program

Director of Education | Jason R. Pierce
Ext 102
Contact Jason about:
  • College of Leadership
  • Educational Programming
  • eLearning
  • Event Speakers
  • Officer Training
  • Pledge Education Program
  • RMT Training
  • Road to Brotherhood
  • Webinars

Administrative Assistance for Chapter Services | Melinda Rosenthall
Ext 116
Contact Melinda about:
  • Annual Chapter Report
  • Chapter Services
  • Community Service
  • Dean’s Council
  • Recruitment
  • Show Cause
  • Student Awards
  • Student Chapter Expansion
Chapter Educational Resource Coordinators

- **Area 1:** Evie Eddins, Florida State ’13 *(Ext 117)*
- **Area 2:** Cady E. Tabeling, Southern Indiana ’11-Life *(Ext 113)*
- **Area 3:** Kortney Petry, Ball State ’11 *(Ext 117)*
- **Area 4:** Liz Vickers, Stetson University ’11 *(Ext 114)*

  - Annual Chapter Report Performance
  - Chapter Event Planning
  - Chapter Health Plans
  - Membership and Officer Reporting
  - Membership Concerns
  - Recruitment
  - Retention
  - Risk Management Probation
  - Show Cause Probation

**Member Service Representatives**

The Member Service Representatives are the “Voices of the Heritage Center.” They are the customer service representatives who handle many day-to-day activities at the Heritage Center. The Member Service Reps can answer many of the general requests you may have.

**Member Services | Debby Orff**

*Ext 110*

Contact Debby about:

- Address changes
- Charters
- E-Mail Addresses
- Initiate Certificates
- Member Processing

**AKPsi Marketplace/Foundation | Hazel Collier**

*Ext 111*

Contact Hazel about:

- Address changes
- Jewelry Orders
- Merchandise Orders
- Officer Updates

**Finances and Collections | Cathy Cole**

*Ext 112*

Contact Cathy about:

- Address changes
- Chapter Account Information
- Chapter Collection Problems
- Invoice and Statement Processing

**Administrative Assistance/Event Registration Services | Judy Pawlus**

*Ext 104*

Contact Judy about:

- Address changes
- Event registrations
- Scholarship applications
Volunteer Fraternity Leadership

Fraternity Board of Directors (BOD)
The fraternity’s board of directors is composed of nine alumni members elected by the Chapter Congress for terms of three years. The board in turn elects its officers who are the chairman, vice chairman, treasurer and secretary. The responsibility of the board of directors is to set policies and procedures that will guide the fraternity into the future. It acts as the supreme governing body of the fraternity between meetings of the Chapter Congress. It is charged with approving the fraternity budget, setting annual goals of the fraternity, overseeing the performance of the CEO and, most importantly, strategic planning. In strategic planning, the board takes input from members through a variety of sources and determines the fraternity’s core values, its vision for the future, or in laymen terms — what does Alpha Kappa Psi want to be known for? Further, it is charged with the responsibility of measuring how programs assist chapters and members to reach the vision. The board is the “big picture” strategic thinker of the organization much like the board of a corporation. The chairman of the board is the highest ranking volunteer in the fraternity.

Management Team (MT)
The Management Team is the volunteer operational arm of the organization. It is composed of the fraternity president, executive vice president, four area vice presidents and 16 regional directors. The Management Team is charged with the responsibility of servicing the chapters of the fraternity within the guidelines of policies and procedures set forth by the board of directors. The Management Team also manages a vast number of fraternity alumni volunteers, such as regional managers, section directors, chapter advisors, and chapter advisory board. The fraternity president serves as the chairman of the Management Team, presides over meetings of the Chapter Congress and appoints operational committees. For a current list of officers and regional directors visit www.akpsi.org/mt.

- The President and Executive Vice President administer the important work of appointing, charging and monitoring committees; overseeing implementation of budgets, resource materials, and educational programs approved by the Board of Directors. The president may appoint a cabinet of volunteers for assistance (as approved by the Board of Directors).
- The Area Vice President is tasked with the administrative oversight of specific Regions/Regional Directors and for executing the tactical direction of Fraternity operations based on strategic guidance from the Board of Directors (BOD) while partnering with the Fraternity Staff.
- The Regional Directors are responsible for leading and supervising their regions. They appoint regional management team members, run their regional officer training, attend conventions, and do other things that make the regional director position the undisputed toughest volunteer position in the fraternity.

Foundation Board of Directors
The Alpha Kappa Psi Foundation, founded in 1951, is a not-for-profit 501(c)(3) organization dedicated to promoting the ideals of AKPsi. Its mission is: providing resources for enhancing the educational experience of future business leaders. The governing body of the foundation is its board of directors. It is charged with the responsibility of setting polices, fundraising goals and plans, an operational budget, and the overall vision of the foundation. A professional staff oversees day-to-day activities. The foundation funds the Academy, All-AKPsi Academic Team, Case Competition award scholarships and numerous scholarships. So the fraternity can have quality speakers at its events (such as the Principled Business Leadership Institute or the College of Leadership), the foundation also underwrites expenses for many speakers through its Principled Business Leadership Fund.
Foundation Scholarships

Academy, Late June (all expenses paid):
The Academy is like no other Alpha Kappa Psi educational experience. It is an intimate, hands-on, challenging leadership development retreat. It is a unique program designed especially for those who demonstrate exceptional qualities for future business leaders. A limited registration cap and a remote location ensure that the experience is highly interactive. Through the generous support of Alpha Kappa Psi alumni, friends and Corporate America, the AKPsi Foundation pays all expenses for those attending the four-day experience.

Application deadline: Spring

All-AKPsi Academic Team:
The All-AKPsi Academic Team recognizes students who maintain excellence in academic standing while making positive contributions to their campus and community. The selection process measures an applicant’s ability to balance the pursuit of a degree with the development of leadership skills, interactive extracurricular participation, and a sense of social responsibility. From among the team members, one or more outstanding individuals receive the Top Scholar Award and are recognized with educational grants.

Application deadline: Fall

Scholarships:
There are more than 30 scholarships available to Alpha Kappa Psi members. Some of these scholarships may have certain requirements. Visit akpsi.org for a current listing of chapter and Fraternity-wide scholarships.

Case Competition:
Through the foundation’s Case Competition, students are introduced to the realities of decision making – including incomplete information, time constraints and conflicting goals – giving them first-hand experience in analyzing business situations. The competition was designed to stimulate students’ thinking by challenging their capabilities and preparing them for future managerial decision making.

Leadership defined: Leadership is the art of mobilizing others to want to struggle for shared aspirations.
– The Student Leadership Challenge by Jim Kouzes and Barry Posner

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"I learned that a great leader is a man who has the ability to get other people to do what they don’t want to do and like it." -Harry Truman
Characteristics of a Leader
Are you a leader? Here is a brief list of leadership characteristics:

| Leaders are good teachers and great communicators. |
| Leaders have stamina. |
| Leaders do what they know is right, rather than what is popular. |
| Leaders are good at managing time. |
| Leaders do not condone incompetence, they replace it. |
| Leaders are reliable and open-minded. |
| Leaders are good listeners. |
| Leaders act with integrity. |
| Leaders inspire a vision. |
| Leaders are trustworthy and able to trust others. |
| Leaders subordinate their egos to the goals of the chapter. |
| Leaders know how to run meetings. |
| Leaders teach all members the basics of chapter operations. |
| Leaders help establish realistic goals and set action plans for reaching these goals. |
| Leaders successfully motivate members on the importance of reaching goals. |
| Leaders recruit competent people. |

Spotting Leadership Potential*

1. Future leaders show initiative and can resolve issues with minimal supervision instead of waiting around for constant direction.
2. Future leaders trust their own judgment and get on with the task at hand, taking responsibility and without fear of making mistakes.
3. Future leaders are thirsty for knowledge and seek mentors and role models as they understand there is much to learn.
4. Future leaders share their knowledge, recognizing that the more they give the more they receive in return. Knowledge hoarders do not make good leaders.
5. Future leaders accept they are not perfect and do not know everything, that they have limitations and do not know and cannot do it all. They are not afraid to show weakness.
6. Future leaders accept responsibility for their own mistakes. Taking ownership and taking risks increases the chance of error. Leaders admit, learn and move on without making excuses.
7. Future leaders take responsibility and don't single people out or shift blame. Whilst any error is still acknowledged, it is ‘ours’ not the fault of an individual.
8. Future leaders inspire and bring out the best in others as their passion and drive are contagious and set the standard for others to aspire to.

Anyone who exhibits more than half of the traits listed above could be one of your emerging leaders and offered the training and development they need to maximize their capabilities.


"It’s a fine thing to have ability, but the ability to discover ability in others is the true test."

-Elbert Hubbard
Life Management

Student leaders are not only organization leaders but also students, spouses and friends. In short, there is more to student leaders' lives than the organizations they lead. A key to balancing all the different roles student leaders must take on requires effective use of their time. The following are some brief hints on how to make the most of your time and some suggested personal characteristics of good time managers.

- **List your goals** | Start with long-term goals and then narrow down your short-term goals. Set your priorities, not only for your goals but the roles you must fulfill.
- **Make a daily “to do” list** | Set your priorities every day. This keeps you on track with your short-term and long-term goals.
  - **Start with the “A’s”** | Categorize your list into A, B and C groups, with A being the most important. Then take the items in the B group and redistribute them to the A and C groups. This way you end up with a list of only high and low priorities. However, be careful to not ignore C items; if they are forgotten about they can turn into urgent A priorities.
- **Always ask yourself ...** | “What is the best use of my time right now?” Do this whenever you have a free moment.
- **Handle each item just once** | If you pick up a piece of mail or receive a note, handle it then and there. Do not set it down before you resolve it, even if that means making a note to yourself to handle it later.
- **Do it NOW** | Do not procrastinate. Remember every big project is just a lot of little projects put together. Take each element one at a time.
- **Delegate** | Give tasks to other people so they can help.

Motivation

How can one promote a higher level of intensity within the chapter? It’s EASY; just follow these 5-steps:

1. Strive to create a strong sense of belonging for everyone involved in the group; the members should feel as if they are honestly needed for whom they are.
2. Foster discussion with the group to set clear and precise goals/objectives for the chapter and ensure progress is communicated and celebrated.
3. Establish a definition of what is expected of each brother so they realize the expectations others have of them.
4. Assign responsibilities challenging others within a range of abilities and interest. These should be responsibilities which contribute to reaching the goals/objectives.
5. Observe the progress of the chapter toward completing the goals/objectives.

When motivating others, remember and understand their personal values may be different than yours. What makes sense to you may not make sense to them. By trying to see something from another person’s point of view and empowering brothers to do what they are passionate about will help the brother and the chapter grow.
**Specific** - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

*Who:* Who is involved?
*What:* What do I want to accomplish?
*Where:* Identify a location.
*When:* Establish a time frame.
*Which:* Identify requirements and constraints.
*Why:* Specific reasons, purpose or benefits of accomplishing the goal.

**EXAMPLE:** A general goal would be, "Get in shape." But a specific goal would say, "Join a health club and workout 3 days a week."

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**Measurable** - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as......How much? How many? How will I know when it is accomplished?

---

**Attainable** - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals. You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

---

**Realistic** - To be realistic, a goal must represent an objective toward which you are both willing and able to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love. Your goal is probably realistic if you truly believe that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

---

**Timely** - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.
The following action items will ensure your term starts off on the right foot. As a chapter officer, it is important that you are familiar with all the resources available to you and the chapter. These resources include materials produced by the Fraternity and local resources (volunteers, alumni) near your chapter. The key to a successful chapter is recognizing how much you can do and when to ask for help. There are thousands of alumni and volunteers who have been in your shoes and are willing to help. Use their experiences to enhance yours!

Action Items:

- Read this officer manual. You must know your duties and those of your fellow officers.
- Study the chapter Bylaws.
- Review the **Board of Directors’ Statement of Policy**. Pay special attention to the Risk Management policies. All of these are essential to a healthy chapter and are each officer’s responsibility.
- Review the **Constitution** and **Statutory Code**.
- Become familiar with **Robert’s Rules of Order**.
- Review the **Ritual of Alpha Kappa Psi** (version 8 or higher).
- Know the fraternity’s vision, core values and guiding principles.
- Log-in to [www.akpsi.org](http://www.akpsi.org) to set-up a profile and become familiar with how to use the chapter reporting tools.
- Read the **Road to Brotherhood**; being familiar with it will be essential in order to properly use it as a reference tool.
- Review the **Annual Chapter Report (ACR)**. The ACR allows you to work together with the chapter advisor and Fraternity to track key components of the chapter. The ACR will help you pass on historical information and chapter data to future members, as well as set short and long-term goals.
- Contact the chapter and faculty advisors to set up personal meetings.
- Set a time for weekly executive board meetings.
- Notify the Heritage Center staff, chapter advisor and regional director of any change in officer names for communication purposes. Ensure the chapter's mailing address is current.
- Become familiar with the resources found at [www.akpsi.org](http://www.akpsi.org).
- Understand the fraternity organizational structure so you can direct your questions to the correct place.
- Have an emergency contact plan so you can contact chapter members in case of emergencies.
- Be professional – you are the role model for the chapter’s behavior.

**General Liability Insurance**

I. INTRODUCTION

The purpose of this manual is to give you an understanding of insurance coverage provided and information to properly report all actual and potential liability and property claims with which you may become involved. A certificate of insurance showing proof of coverage is provided with this manual. The final responsibility for the success of the insurance program rests with our fraternity and chapter. It is always important to remember that our first line of defense in liability matters is loss prevention, next is loss control, and the insurance contract is the final line of defense. The undergraduate and alumni members' willingness to understand and assume the responsibility of sound risk management practices is a cornerstone of our program. In the event that an incident or claim does arise, the Alpha Kappa Psi Fraternity Heritage Center and Willis Insurance, will oversee the effective handling of all incident and claim investigation. An incident reporting form that must be completed and submitted at the time of any incident that results in bodily injury or property damage can be found at [www.akpsi.org](http://www.akpsi.org) in addition to a full insurance and claims manual.
II. LAWSUITS
There will be occasions when lawsuits may be served on a member of your chapter. As there is only a limited time to answer a lawsuit, the following procedure applies:

a) Treat any potential, actual claim or lawsuit as a high priority item.

b) Utilizing the incident reporting form, note all relevant information.

c) Forward the suit and incident report by U.S. Postal Service Express Mail to the Alpha Kappa Psi Fraternity, Heritage Center, Attn.: Brian Parker, Managing Director of Operations.

III. GENERAL LIABILITY CLAIMS
The types of General Liability claims can be numerous and usually arise out of conditions of a chapter’s premises. They more than likely involve injury or damage to someone other than an employee or an officer of the fraternity. While on the scene, if possible, get all names, addresses and phone numbers of all parties involved, as well as any witnesses to the accident. Immediately complete the incident reporting form and submit.

IV. WHAT SHOULD BE REPORTED?
Bodily injury to anyone other than an employee and any property damage for which there is a possibility that a claim may be made against Alpha Kappa Psi Fraternity. Be sure to fully complete the enclosed incident reporting form that will provide the needed information regarding the claim. It is imperative that all losses or incidents be reported immediately to the Alpha Kappa Psi Heritage Center (See phone numbers and address on below). The Alpha Kappa Psi Fraternity Heritage Center is responsible for providing the initial report of the claim to HRH/Kirklin & Co, Inc. Once the claim report is sent to HRH/Kirklin & Co, Inc. you will likely be contacted directly by HRH/Kirklin & Co, Inc. to discuss the incident. If you are unable to obtain necessary details when first notified of any incident, still report any known facts.

V. INCIDENT/CLAIM REPORTING

<table>
<thead>
<tr>
<th>ATTN: Brian Parker</th>
<th>ATTN: Mick McGill</th>
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</thead>
<tbody>
<tr>
<td>Managing Director of Operations</td>
<td>Vice President, Client Advocacy</td>
</tr>
<tr>
<td>7801 E. 88th Street</td>
<td>10707 Pacific Street, Suite 200</td>
</tr>
<tr>
<td>Indianapolis, IN 46256-1233</td>
<td>Omaha, NE 68114</td>
</tr>
<tr>
<td>(317) 872-1553 – Phone</td>
<td>(402) 898-4199 – Phone</td>
</tr>
<tr>
<td>(317) 872-1567 – Facsimile</td>
<td><a href="mailto:mmcgill@willis.com">mmcgill@willis.com</a></td>
</tr>
</tbody>
</table>

VI. GENERAL LIABILITY INSURANCE PROGRAM
The following description is a summary only and is not intended to serve as a substitute for the actual insurance contract. The Alpha Kappa Psi Fraternity insurance program provides Blanket Public General Liability Coverage of $1,000,000 per occurrence with a $2,000,000 general aggregate for all participating chapter and chapter house organizations. (See the end of this section for explanation of types of coverage.) The coverage is for bodily injury and property damage. This protects the local chapter, its officers and members, the house corporation and the fraternity, including appointed volunteers, from claims arising out of bodily injury and property damage occurring at the premises or at chapter functions away from the premises. It also protects against claims arising out of libel, slander, false arrest, invasion of privacy, eviction from the premises, consumption of food and beverages and incidental malpractice. It must be understood, however, that our coverage is for general public liability. It is not accident insurance covering initiated and uninitiated members for injuries sustained on the chapter premises and/or in chapter activities. Liability insurance is not a substitute for medical insurance. Further, it is not Workers’ Compensation Insurance, which may be required for chapter employees such as cooks and housemothers.

Insurer: Liberty Surplus Insurance Corporation
Policy Period: December 1, - November 30
Policy Numbers: DGLCH184369035
Adding Additional Insureds

Additional Insureds may be added to this policy. Such insureds may be your landlord, college, university and/or proprietor from whom the chapter may be renting property for a special event. **Request for an additional insured endorsement should be made in writing at least three weeks in advance of any event** and sent to Alpha Kappa Psi Fraternity Heritage Center, Attn.: Brian Parker, Managing Director of Operations, 7801 E. 88th Street, Indianapolis, IN 46256-1233. Phone (317) 872-1553, Fax (317) 872-1567. Upon approval of the request by the Alpha Kappa Psi Administrative Office and the insurance carrier Willis will issue a certificate of insurance with the original forwarded to the Additional Insured and a copy to the Heritage Center.

What Doesn’t Our Coverage Include?

i. Any claim of bodily injury and/or property damage from an incident resulting when:
   1) An illegal act was performed.
   2) An intentional act was performed.
   3) A contract made by the chapter is broken.
   4) There is any discharge, release or escape of smoke, vapors, soot, fume, acids, toxic chemicals, etc... upon land, the atmosphere of any water course or body of water.
   5) A chapter employee is hurt on the job. Each chapter with any employees must purchase Workers’ Compensation coverage locally.

ii. Any claim of property damage to property owned by, rented by, used by, or cared for by the chapter. An example, the chapter rents a portable generator for an outdoor function, and while it is in the care, custody and control of the chapter it is damaged and the lesser holds the chapter responsible and liable. No coverage is available under the Alpha Kappa Psi Fraternity liability insurance contract.

House Inspections

The insurance company has the right to make inspections and surveys at any time, give Willis Insurance and Alpha Kappa Psi Fraternity reports on the conditions that are found and recommend changes. Any inspections, surveys, reports or recommendations relate only to insurability and the premiums to be charged. Chapters and house corporations will be given advance notification of any inspections and copies of all reports.

Legal and Illegal Activity

Simply stated, no insurance policy in the world provides coverage for violations of the law. The Alpha Kappa Psi Fraternity insurance program is no exception to this rule. The key points to understand are:

- Compliance with federal, state, local and institutional (college or university) laws and regulations is required.
- Compliance with all regulations and policies of Alpha Kappa Psi Fraternity is required.

Those individuals who choose to violate these rules may void the protection for themselves under the Alpha Kappa Psi insurance program. **Every effort has been made to avoid their actions from jeopardizing the other members, other entities, or other named insureds protected by the Alpha Kappa Psi program.** The following brief examples are intended to provide illustration and do not represent legal advice.

i. With the broad awareness of its membership, the chapter serves alcohol to a minor in violation of the law at a chapter-sponsored function. In the event of an injury, claim or lawsuit, those persons found to be in violation of the law and/or Alpha Kappa Psi Policy (in this case the entire chapter) most likely would be without insurance protection. The other named insureds would be protected (i.e. the Fraternity, house corporation or alumni volunteers).

ii. Two of the members of a 65-man chapter cause injury to someone in connection with a hazing incident. This activity was unauthorized and done secretly without the knowledge of the chapter,
and strictly against chapter policy. In the event of an injury, claim or lawsuit, those persons (in this case, the two members) found to be in violation of the law and Alpha Kappa Psi Policy could be without insurance protection. The chapter, house corporation and other named insureds would be protected.

Great effort has been made to ensure coverage will be provided to those individuals and entities exposed to claims through no fault of their own. Chapters and chapter officers are protected from the unauthorized actions of individuals. The assets of house corporations are protected from the unauthorized actions of their chapters. Chapter Advisors are protected from the unauthorized actions of their individual chapter members and the chapter as a whole, as are the house corporations and all other appointed alumni volunteers involved with the Fraternity.

All questions regarding insurance interpretation and coverage should be directed to Willis Insurance. c/o Trude Smouse, 10707 Pacific Street, Suite 200, Omaha, NE 68114, Phone (800.736.4327, email smouset@willis.com.

**Hazing Policy**

Alpha Kappa Psi’s Hazing Policy can be found in the [Board of Director’s Statement of Policy](#) and online at [www.akpsi.org](http://www.akpsi.org). It shall be the responsibility of all members of Alpha Kappa Psi Fraternity to determine college, university or other legal jurisdiction policy regarding hazing, mental or physical, and to comply totally with such policies.

**Hazing Prevention**

When organizations are challenged to eliminate hazing practices, some members are often resistant to this change. In many cases, those who are most vocal against eliminating hazing are those who are upset about the hazing they themselves endured (but don’t admit this publicly) and expect others should be “abused” as well in order to gain “true” membership in the group just like they did.

Of course, if you try to eliminate hazing in your chapter, you will likely encounter many elaborate reasons for why this will be devastating for your group. While there will be some staunch supporters of the status quo, there will be many who can be convinced of the negative effects and potential risks of hazing. Believers in the supposed “benefits” of hazing may be more likely to change their opinion if they can envision some alternatives. The following are supposed benefits hazers believe they accomplish and some alternatives you can instill in your chapter that will accomplish the same goal:

- Foster unity:
  - Brother retreat.
  - Visit a ropes course to work on group cohesiveness, communication and leadership skills.
  - Non drinking socials to learn about each other.

- Develop problem-solving abilities:
  - Have discussions about chapter weaknesses such as poor recruitment, apathy and poor scholarship, and develop solutions the chapter might then adopt (i.e. create a business plan).
  - Do groups for rituals so they can work under a deadline.

- Teaches you to work under stress:
  - Prepare a challenging fundraiser and see it through to the end.
  - Have an interview workshop to prepare you better for tough interviews.

- Develop leadership skills:
  - Encourage participation in school/campus activities outside of the chapter.
  - Encourage new members to get involved in committees and/or leadership roles.
  - Develop a peer mentor program within your group for leadership roles.
- Invite school/community/business leaders into the chapter to share their experiences.
- Instill a sense of membership:
  - Start new traditions ~ it only takes a few academic terms for it to become a tradition.

**Believe it or not:**
Chapters found responsible of hazing have been required to eliminate hazing in order to stay open as a chapter of Alpha Kappa Psi. These chapters report that eliminating hazing increased member involvement therefore reducing apathy!

**Parliamentary Procedure**

**Basic Principle: Minority is heard but majority rules**

I. **Establish a quorum**  
A quorum is the number of people who must be present to take legal action on business matters and is essential to conducting business meetings. The quorum is stipulated in the bylaws, and before any business is discussed, the chair should establish for the record that a quorum exists.

II. **All members have equal rights**  
These include the right to make motions, debate, and vote. You need a two-thirds majority vote to deprive members of basic rights — such as closing or limiting debate and closing nominations. No member may be forced to vote, silence gives consent. General business — majority of those present

III. **Debate, decorum, and order**  
Only one main motion (one subject) may be considered at a time, and only one person may speak at a time. Anyone who wishes to make a motion should first be recognized by the chair and preface the motion with the words, “I move that.” If someone wishes to second the motion, that person does not have to wait to be recognized but merely calls out, “I second the motion.” Without a second motion, the chair moves on to the next agenda item. After the motion has been made and seconded, the chair restates the motion, which is termed a main motion. Discussion begins. To ensure order and that only one person speaks at a time, the chair recognizes members before they may speak. There must be an opportunity for at least one pro and one con for each motion and amendment. Technically, after a second is made, a motion cannot be withdrawn (not efficient to enforce).

IV. **Amendments**  
The purpose of an amendment is to change a motion already under consideration. If a member believes the right topic is being discussed but wants to modify the wording of the motion, he or she calls for an amendment. Technically, a motion may be amended, and the amendment to the motion may be amended, but no further amendments may be made. Amendments are motions, and as such, they require a second and full debate. Amendments can slightly change the main motion. Typically, if the author of the original motion agrees with the amendment it can be accepted as a “Friendly Amendment” and incorporated into the original motion without the need for debate or a vote.

V. **Closing Debate**  
A member who wishes to end debate may interrupt discussion and say “I move/call the previous question.” This motion requires a second and must receive a two-thirds majority vote. Should it receive a two-thirds majority, the chair then states, “The previous question has been called, all those in favor of the motion to...”

VI. **How to Run a Meeting**  
  A. Decide how strict to be with parliamentary procedure — generally, the larger the group, the more strict you should be.
B. How will one be recognized to speak? — typically by raising your hand then being called upon by the chair. Large assemblies may have fixed microphones where lines are formed to speak.

C. Chair controls flow of meeting.
   i. Must appear unbiased, can never state an opinion on the motion before or during debate.
   ii. To be effective, must control flow of meeting by:
      iii. Quickly and decisively granting permission to speak.
      iv. Always watching that comments are being made at the appropriate times (a pro should be a pro, not a public service announcement; points of information should be questions not pros/cons). Always stop someone and ask him or her to explain his/her point if it sounds like the granted time is being appropriately used (if it sounds like someone is making a con during a point of information).
   v. Quickly and decisively making judgments on points of order.
   vi. Prompt for actions if meeting slows down (chair will entertain motion to _____ — such as close debate, open a window, consider "X").
   vii. Don’t be afraid to take a recess if you need to clarify points or get some information.
   viii. Be quick to keep people in order (not speaking out of turn).
   ix. Don’t let debate get personal — name-calling is not allowed (try to get people to speak in the third person when referring to other people in the room and to address actions not people).

D. Use other resources — Warden, Parliamentarian, etc.

VII. Efficiency Tips
A. Most motions can be voted on by acclamation (general consent).
B. Use voice vote for motions. Chair’s ruling stands on results of voice vote unless “call for division” is called for, then vote count is needed.
C. Chair cannot make motions but can offer to “entertain” a motion which may fix a particular sticking point in debate.
D. If chair doesn’t know the answer to a “point of information,” he or she can call on someone else to answer it.

VIII. Potential Problems
A. Noisy individual — warning from chair then warden removes.
B. Bad environment (hot, cold) — chair can recess meeting to try remedy the situation.
C. People speaking without being recognized — reminder from chair to wait to be recognized, if doesn’t work, warning from chair then warden removes.
D. Debate lasting too long — “without objection, chair ends debate after two or more pro/cons.” (Two of the same back-to-back.)
E. Meeting lasting too long — “without objection, chair rearranges agenda and will postpone consideration of certain items until next meeting.”
F. Everyone wants to speak — in the order they raise their hands, a list is made, chair simply calls names off this list.

*Adopted from Parliamentary Procedure: A Few Rules Help Keeps Order, by Kathy Gill*

“Entrepreneur Larry Wilson defined the difference between passion and drive as the difference between expressing yourself and proving yourself.” -- On Becoming a Leader By Warren G. Bennis
Here are some motions you might make, how to make them, and what to expect of the rules.

<table>
<thead>
<tr>
<th>To Do This:</th>
<th>You Say This:</th>
<th>May you interrupt the speaker?</th>
<th>Do you need a second&gt;</th>
<th>Is it debatable?</th>
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<th>What vote is needed?</th>
<th>Can it be reconsidered?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADJOURN MEETING</td>
<td>“I move that we adjourn”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>CALL AN INTERMISSION</td>
<td>“I move that we recess for...”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>COMPLAIN ABOUT HEAT, NOISE ETC.</td>
<td>“I rise to a question of privilege”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No (usually)</td>
</tr>
<tr>
<td>TEMPORARILY SUSPEND CONSIDERATION OF AN ISSUE</td>
<td>“I move to table the motion”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>END DEBATE AND AMENDMENTS</td>
<td>“I move the previous question”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>POSTPONE DISCUSSION FOR A CERTAIN TIME</td>
<td>“I move to postpone the discussion until...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>GIVE CLOSER STUDY OF SOMETHING</td>
<td>“I move to refer the matter to committee”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>AMEND MOTION</td>
<td>“I move to amend the motion by...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>INTRODUCE BUSINESS</td>
<td>“I move that...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
</tbody>
</table>

THE MOTIONS LISTED ABOVE ARE IN ORDER OF PRECEDENCE... BELOW THERE IS NO ORDER...

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>PROTEST BREACH OF RULES OF CONDUCT</td>
<td>“I rise to a point of order.”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No</td>
</tr>
<tr>
<td>VOTE ON A RULING OF THE CHAIR</td>
<td>“I appeal from the chair’s decision”</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>SUSPEND RULES TEMPORARILY</td>
<td>“I move to suspend the rules so that...”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>AVOID CONSIDERING AN IMPROPER MATTER</td>
<td>“I object to consideration of this motion”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>6</td>
</tr>
<tr>
<td>VERIFY A VOICE VOTE BY HAVING MEMBERS STAND</td>
<td>“I call for a division” or “Division!”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No</td>
</tr>
<tr>
<td>REQUEST INFORMATION</td>
<td>“Point of information.”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No</td>
</tr>
<tr>
<td>TAKE UP A MATTER PREVIOUSLY TABLED</td>
<td>“I move to take from the table...”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>RECONSIDER A HASTY ACTION</td>
<td>“I move to reconsider the vote on...”</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>6</td>
<td>No</td>
<td>Majority</td>
</tr>
</tbody>
</table>

NOTES:
1. Unless vote on question is not yet taken.
2. Unless the committee has already taken up the subject.
3. Only if the motion to be amended is debatable.
4. Except in doubtful cases.
5. A majority vote in negative need to revisit ruling of chair.
6. A 2/3 vote in negative needed to prevent consideration of main motion.
7. Only if the main question or motion was not, in fact, considered.
8. Only if motion to be reconsidered is debatable.
As vice president of administration, it is important you become familiar with all the responsibilities of the chairmen who serve on your committees since you oversee all of the programs at the chapter level. You also serve as the chapter’s president when he/she is absent. Therefore, you must be familiar with those responsibilities, too. The following action items will ensure your term starts off on the right foot:

- Attend the weekly executive board meeting.
- Read and understand the duties and responsibilities of officers and committees of the chapter.
- For many chapters, this position oversees the Annual Chapter Report (ACR) because it documents every program and activity of the chapter.
- If you are elected in the middle of the academic year, obtain the partially completed ACR from the outgoing vice president of administration and determine the status of each activity outlined. Determine if the chapter has completed the items planned. If not, work with the executive board to plan to complete activities. You may find some planned items not finished, with some future items already completed.
- If you are elected toward the end of the academic year, immediately obtain the ACR and decide which items have not been completed. Work with the outgoing vice president of administration and the new executive board to complete the balance of the items on the ACR.
- Items which are frequently left to the last minute include the IRS Form 990, the Annual Audit (the responsibility of the Treasurer), the chapter history (the responsibility of the Historian), and the Recruitment Plan (the responsibility of the vice president of membership). The final ACR report is due to your Regional Director by May 15. Your Regional Director will review your ACR and submit it to the Heritage Center by June 1. Send it in early, so if there are any discrepancies, they may be corrected before the June 1 deadline.

**Characteristics and Ideas:**

- Strong discipline/communication with committee chairs
- Structured updates of committee progress through monthly committee reports
- Tracking chapter statistics
- Inform chairs of their responsibilities
- Set a goal to get at least 60% of the total ACR points in the fall academic term
- Work closely with the treasurer on budgets
- Assist in the creation of meeting agenda and the chapter calendar

*Outstanding leaders go out of their way to boost the self-esteem of their personnel. If people believe in themselves, it’s amazing what they can accomplish.”*  
Sam Walton

**Chapter calendar year in review — Due Dates**

(Updated 08/13)
For more training on the ACR, download and view the ACR webinar.

July
- 15th – Alumni chapter quarterly calendar submissions.

August
- 15th – All Student and Alumni Chapters – IRS Form 990 EZ or 990-N (e-Postcard) due to Internal Revenue Service along with a copy of this form to the Heritage Center.
- Chapter calendar and budget due to chapter advisor and regional director.

September
- Fall pledge fees and pledge reports within seven business days following the ceremony.
- Make sure the Heritage Center has current officer information.
- Make sure the Heritage Center has current UPS compliant mailing address for chapter (no P.O. Boxes).
- Fall Recruitment Plan sent to regional director and chapter advisor.

October
- 15th – Fall student member dues.
- 15th – Annual chapter insurance premium.
- 15th – Alumni chapter rosters due to the director of alumni development.
- 15th – Alumni chapter quarterly calendar submissions.
- Fall pledge fees and pledge reports (for quarter schools) within seven business days following the ceremony.

November
- 1st – Final date to remove members from roster for fall student member dues credit.
- 27th – All-AKPsi Academic Team application.
- Officer notification form to be submitted within seven business days following the election.
- Fall initiation fees and initiate report within seven business days following the ceremony.

December
- 13th – Early Bird PBLI registrations.
- 13th – Case Competition registrations.
- 31st – Mid-year Annual Chapter Report (ACR).
- 31st – Chapters must have a current balance.
- Fall initiation fees and initiate report within seven business days following the ceremony.
- Officer notification form to be submitted within seven business days following the election.
- New brother and new alumni orientations to be held.

January
- 15th – Alumni chapter roster additions/deletions due.
- 15th – Board of Director nominations due at the Heritage Center.
- 15th – Alumni chapter quarterly calendar submissions.
- 20th – Chapter foundation scholarship application deadline (for chapters with scholarship endowments through the AKPsi Foundation).
- PBLI registrations.
• For schools that initiate in January: Initiation fees and initiate report within seven business days following the ceremony.
• Spring Recruitment Plan sent to regional director and chapter advisor.

**February**
• 15th – Spring student member dues.
• 15th – Alumni chapters are invoiced franchise fee.
• 22nd – Foundation scholarship application.
• Spring pledge fees and pledge reports within seven business days following the ceremony.

**March**
• 1st – Final date to remove members from roster for spring student member dues credit.
• 10th – Academy applications.
• 15th – Alumni chapters franchise fees.
• 31st – Chapter fiscal year ends. (All chapters)
• Spring pledge fees and report of pledges due (for quarter schools) within seven business days following the ceremony.

**April**
• 15th – Project ReConnect updates.
• 15th – Alumni chapter quarterly calendar submissions.
• 30th – Board of Directors election ballot.
• Chapter officer notification form to be submitted within seven business days of election.
• Spring initiation fees and initiate report within seven business days following the ceremony.
• Summer address information for chapter contact.
• New brother and alumni orientations to be held.

**May**
• 15th – Annual Chapter Report (ACR) (student chapters only)
• 15th – Alumni ACR (alumni chapters only)
• 15th – Spring roster due from all alumni chapters to the director of alumni development
• 31st – Chapter audit report.
• Spring initiation fees and initiate report are due (for quarter schools) within seven business days following the ceremony.

**June**
• 1st – Fraternity award nominations and applications.
• 15th – Revised ACR submissions by quarter schools only.
• 30th – All student and alumni chapters must have a current balance.
• 30th – Last day to donate to the Yellow Rose Society for membership in the current fiscal year.

**These dates are in addition to any guidance/probation deadlines assigned to your chapter.**
Frequently Asked Questions

What due dates do I need to know?
The most accurate and up-to-date due dates for your chapter are listed on www.akpsi.org. Check out the Calendar of Chapter Due Dates for the most up-to-date calendar planning.

When are the chapter minutes due?
Within seven days of your meetings. The Executive and Chapter Minutes are to be sent to the CA, SD and RD. All minutes should be sent to chapter members with 24 hours of the meeting.

What if the chapter roster is inaccurate?
Correct it immediately by logging into the chapter reporting tools at https://www.akpsi.org/cmt. Remember your dues and insurance billings are based on your roster.

Can first-year students pledge?
There is not a minimum GPA to pledge Alpha Kappa Psi, therefore freshman can pledge. Refer to the Statutory Code (Caput II Section 6) for more information.

Is there an inactive status?
No, circumstances such as internships, co-op, student abroad, military duty or medical/extreme hardship are considered for Leave of Absence status. Special exceptions have been made for those who are extremely ill, pregnant, etc., but approval is required by your RD. These members must be reported as Leave of Absence and they are to re-affiliate (and be reported as doing so) upon their return. There are NO “social memberships,” “senior status,” etc. Leave of Absence status is different than suspension due to attendance issues and/or financial delinquency.

How can a member be removed in good standing?
Only by leaving the university; this could be because they “drop out” of school, graduate with the degree in which they pledged (even if they stay on for grad school), transfer to another school or branch of your school (more than 50 miles).

Are there any circumstances when the brother must re-affiliate?
Yes, if the brother returns to the university at which their home chapter is located to complete the degree in which they pledged. (Examples of this would include conclusion of internships, co-op, and medical leave of absence.)

What are the different membership forms?
Chapter rosters can be updated online using the Chapter Management Tools at http://www.akpsi.org/cmt. Once you update your roster online, an e-mail is automatically sent to you confirming these changes have been requested. A second email will be sent once the changes are approved by the Heritage Center. Any officer currently reported to the Heritage Center can access the Chapter Management Tools.

- Report Pledges – Reporting of all new pledges. Information required: Full name, address, phone, e-mail address, date of birth, expected graduation year, induction date and expected initiation date. Download the Pledge Information Collection Form and have the pledges fill one out for easier input into the website. Due within seven business days of induction.
- Report Initiates - Reports your new brothers. Due within seven business days of initiation.
• **Chapter Roster Management** – Report status changes (graduating seniors, suspended brothers, leave of absences) and officer changes (incoming and outgoing officers; must be one of seven positions found in the *Constitution*; President, VP of Membership, VP of Admin, VP of Alumni Relations, Treasurer, Secretary, and MOR). A reason must be given for each suspension and Leave of Absence.

• **Member Reinstatement Form** – Reports brothers reinstated from temporary removal; also used to report affiliation of a brother who transfers from one university to another and joins the chapter.

### Can a brother resign from the fraternity?
The membership of a member of the fraternity shall terminate upon the receipt of the member’s written resignation by the CEO of the fraternity or upon the member’s death. Any resignation does not relieve the member of any obligation incurred or commitments made before the resignation. (*Constitution, Article II, Section 8D*). Chapters cannot resign their members, members can only resign themselves.

A brother who resigns cannot attend any fraternity meetings, rituals or events and should not refer to his or her former membership or fraternity experiences in any document, such as résumés, employment applications, or job interviews.

### Can a chapter purchase alcohol?
It cannot! See the risk management policies in the *Board of Directors Statement of Policy*.

### What is the chapter’s fiscal year?
Per the *Constitution and Statutory Code* each chapter shall follow the fiscal year of April 1 – March 31. NO EXCEPTIONS.

### What is an audit and when should it be done?
It is a review of all income and expenses and serves to ensure to the chapter, the outgoing treasurer and the incoming treasurer all funds have all been properly accounted for and any questions are resolved in a timely fashion. It should be done at the end of the treasurer’s term by the audit committee, should not include the treasurer and preferably will include at least one faculty/alumnus/CPA. A copy of the chapter audit is due to the Heritage Center by May 31 of each year after the conclusion of the chapter fiscal year (March 31). Chapters are encouraged to reference the *Chapter Audit Manual* for assistance.

### What are officer evaluations and when should they be done?
Officer evaluations are an opportunity for the brothers to give the officers of the chapter feedback and constructive criticism on themselves in several categories. Some chapters do this once an academic term (after the first third of the term); others do it twice an academic term (at the 1/3 point and at the 2/3 point). It should be stressed that this is not personal and should be used as an anonymous way to help each officer grow and develop on a professional level. A sample officer evaluation can be found in the *Road to Brotherhood*.

### What is an incident report and when do I send one?
An incident report is filled out whenever a negative event occurs, especially one which could result in legal issues, whether a lawsuit or police or judicial action. Examples are anytime the “authorities” (police, ambulance, univ. etc.) are involved. Even if you think it will “go away,” you should document it! Always consult with the RMT if there is even a question. When in doubt write it out! Incident forms can be found online in the *Insurance and Claims Manual*.

### How do I know who to send copies to?
Anything sent to the Heritage Center should be copied to the RMT. Most items will be sent to CA, SD and RD.
What is a Judicial Review Board?
The purpose of the Judicial Review Board is to create a mechanism by which effective and efficient disciplinary action may be taken against brothers or pledges of the chapter in a timely fashion. This provision is not intended and shall not, at any time, circumvent any of the rights and privileges granted to the same by the Bylaws, the Constitution and Statutory Code or the Board of Directors Statement of Policy of Alpha Kappa Psi.

MISSION: The Judicial Review Board may review any action by, of, or between pledge(s), brother(s), and their guest(s) (for those actions they will be held accountable) which may be considered inappropriate behavior, detrimental to the reputation of Alpha Kappa Psi and this chapter, or endangers the continuous smooth operations of this chapter. The Judicial Review Board ensures that a complete and thorough investigation is conducted, establishing the validity of the charges, and, if valid, the guilt or innocence of the accused and establishing an equitable punishment in the case of the former.

The Judicial Review Board is a formal remedy for serious or severe grievances against members of Alpha Kappa Psi. Any personal or minor problems can usually be settled through more informal channels. The Judicial Review Board is also responsible for hearing appeals by members who have been fined for any reason. The Judicial Review Board is encouraged to contact the Fraternity Judiciary Committee with any questions or uncertainties.

The Judicial Review Board should not need to be utilized more than a few times an academic term. If the Judicial Review Board is being utilized too frequently this is an indication of deeper problems within the chapter and the Judiciary Committee should be consulted.

Anytime the Judicial Review Board conducts an investigation it is to fill out an Investigation Report Form found online and submit it to the Judiciary Committee. Anytime an investigation is due to an alleged violation of a risk management policy (hazing, alcohol or sexual harassment) the chapter must forward this information onto the Judiciary Committee for final review and ruling.

For more information on Judicial Review Boards, see the Judiciary Committee Operations Manual found online at www.akpsi.org.

Where can I go to get additional education?
Additional education is available through webinars and eLearnings on www.akpsi.org. They offer an opportunity to supplement your programming schedule with topics that are more difficult to find locally. The webinar schedule and topics change each academic year. For the most current schedule and to register go to https://www.akpsi.org/webinars.

All webinars are recorded and placed in the webinar library which you can access at any time here. Simply go to www.akpis.org/webrecordings to find a topic!

All eLearning programs can be found here: www.akpsi.org/elearning.
Glossary
Here are some common words and abbreviations used in Alpha Kappa Psi:

- **ACR: Annual Chapter Report**: chapter operations reporting tool
- **AVP: Area Vice President**: Leads an Area of AKPsi
- **BOD: Board of Directors**: group within fraternity responsible for setting policy and fraternity direction
- **BoDSoP: Board of Directors Statement of Policy**
- **CA: Chapter advisor**: An alumnus member who guides a chapter
- **CAB: Chapter Advisory Board**: smaller time commitment positions in specialty areas (recruitment, finance, etc.), under the direction of a chapter advisor and assist one specific chapter
- **CoL: College of Leadership**: held jointly with Convention
- **EVP: Executive Vice President**: assists the president
- **FA: Faculty advisor**: faculty member that guides a chapter
- **HC: Heritage Center**: central office for the fraternity, foundation and paid staff members
- **Induction**: Ceremony to become a pledge
- **Initiation**: Ceremony to become a brother
- **JC: Judiciary Committee**: reviews issues as related to the risk management policies on behalf of the fraternity
- **JRB: Judicial Review Board**: reviews membership issues within a chapter as pertains to rules and regulations
- **MT – Management Team**: consists of the president, executive vice president and 13 regional directors
- **OT: Officer Training**
- **PBLI: Principled Business Leadership Institute**
- **PEP: Pledge Education Program**: The only approved pledge program of the fraternity
- **RD: Regional Director**: oversees the chapters and volunteers within their region
- **RMT: Regional Management Team**: consists of CAs, FAs, SDs, regional managers and RD
- **RTB — Road to Brotherhood**: comprehensive membership program following the lifecycle of a brother from recruit to alumni
- **SD: Section Director**: oversees chapters within a portion of a region
- **YRS: Yellow Rose Society**: student giving program sponsored by the Alpha Kappa Psi Foundation
If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.

John Quincy Adams
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**Alpha Kappa Psi Vision, Core Values and Guiding Principles**

The Alpha Kappa Psi Vision, Core Values and Guiding Principles should be the foundation for any chapter activity. As an officer it is important to educate other members about their significance. Let these guide you and be the foundation of decisions and discussions.

### Vision

Alpha Kappa Psi is recognized as the premier developer of principled business leaders.

### Core Values

| Brotherhood | Trust, respect, cooperation, companionship and aid to brothers is the expected norm |
| Knowledge   | Education and experience is emphasized and shared |
| Integrity   | All actions, whether in business or in life, are guided by honesty, ethics and fairness |
| Service     | Sharing of time, talent and treasure with society and our fraternity is a priority |
| Unity       | A common understanding of our vision and values that transcends chapter, generation and profession is utilized to anticipate and create the future |

### Tagline

Alpha Kappa Psi — Shaping People, Shaping Business

### Guiding Principles

| Building Brotherhood | The esoteric quality we call "Brotherhood" is of vital importance though difficult to define. Our members, from the day they become brothers until the end of their lives, foster a great love of the fraternity and a fondness for brother members. While brotherhood manifests itself in a multitude of ways, at its center is a sense of duty and respect for both the fraternity and individual members. All activities and decisions that involve the fraternity are guided by a sense of stewardship and selflessness. Members are anchored by the need to do what is in the best interest of the fraternity as a whole and are not swayed by individual self-interest. |
| Lifelong Learning | College is merely the beginning of business education. Our members share their knowledge and experiences openly with the people they work with, regardless of rank or position. In addition, they seek out opportunities to share their real-world experience with brother members, and in doing so they enhance the lifelong learning of those members. |
| High Ethical Standards | While the business world offers many opportunities for success and advancement, it also requires us to make decisions about how we succeed. Our members understand the importance of making decisions and conducting business in a way that takes into account both legal and ethical considerations. Our members serve as role models through their consistently fair and ethical conduct. |
| Improving Communities | Much is expected of those to whom much is given. Business professionals who seek to improve the communities in which they do business improve lives and develop goodwill. Our members actively give back to their communities through volunteer activities and monetary support. |
| Enhancing the Fraternity for Life | College chapters serve as living laboratories for classroom concepts and professional conduct. In turn, lessons learned in the fraternity prepare members for success in the business world. Because they recognize the value and importance of our Fraternity, our members are united in their... |
passion to build a legacy for the future. They support the fraternity through volunteer leadership and monetary gifts.

**Heritage Center Staff**

**Alpha Kappa Psi** | 7801 E 88th Street :: Indianapolis, IN 46256-1233
Phone Number: (317) 872-1553 :: Fax Number: (317) 872-1567
[www.akpsi.org/staff](http://www.akpsi.org/staff)

**Where do I get help?** Always start with the [www.akpsi.org](http://www.akpsi.org) website. Several standard questions can be found there. If the question needs to be elevated to the next level, check with your chapter advisor, section director or regional director. If they are unable to help, they will direct you properly.

**Chief Executive Officer | Steve Hartman, CAE**
*Ext 101*
Contact **Steve** at about:
- Operations, Fraternity & Foundation
- Staff Concerns
- Strategic Planning

**Managing Director of Alumni Services and Chief Operating Officer, Alpha Kappa Psi Foundation | Jess C. LaNore, CAE, Purdue ’00-Honorary/Life**
*Ext 109*
Contact **Jess** about:
- Academic Team
- Foundation Contributions
- Licensing/Trademarks
- Major Giving
- Merchandising Programs
- Planned Giving
- Scholarships
- The Diary

**Managing Director of Operations | Brian D. Parker, CAE, Indiana ’93-Life**
*Ext 105*
Contact **Brian** about:
- Expense Reimbursement
- Financial Statements, Fraternity & Foundation
- Liability Insurance
- MAPP
- Risk Management

**Managing Director of Student Services | Jessica R. Seitz, CAE, Auburn ’02-Honorary/Life**
*Ext 103*
Contact **Jessica** about:
- Academy
- Case Competition
- Certified Fraternity Volunteer (CFV)
- Chapter Advisory Board (CAB)
- Convention
- Meeting Planning
- PBLI
- Volunteer Services
Director of Communication | Jennifer L. Adamany, San Diego ’05-Life  
Ext 106
Contact Jennifer about:
- Branding
- Communication Technology
- Marketing
- Media Relations
- Publications
- Website

Director of Communication and Information Services | Christopher W Pye, Shippensburg ’04-Life  
Ext 119
Contact Chris about:
- Career Center (online)
- Marketing
- Project Reconnect
- Surveys (online)
- Technology
- Website

Director of Alumni Development | Jeffery D. Hughes, South Florida ’00-Life  
Ext 108
Contact Jeff about:
- Affinity/Royalty
- Alumni Association
- Alumni Awards
- Alumni Chapter Information
- Alumni Development
- Alumni Chapter Expansion
- Alumni Listings
- Chairman’s Advisory Council
- Life Loyal Program

Director of Education | Jason R. Pierce  
Ext 102
Contact Jason about:
- College of Leadership
- Educational Programming
- eLearning
- Event Speakers
- Officer Training
- Pledge Education Program
- RMT Training
- Road to Brotherhood
- Webinars

Administrative Assistance for Chapter Services | Melinda Rosenthal  
Ext 116
Contact Melinda about:
- Annual Chapter Report
- Chapter Services
- Community Service
- Dean’s Council
- Recruitment
- Show Cause
- Student Awards
- Student Chapter Expansion
Chapter Educational Resource Coordinators

- **Area 1:** Evie Eddins, Florida State '13 *(Ext 117)*
- **Area 2:** Cady E. Tabeling, Southern Indiana '11-Life *(Ext 113)*
- **Area 3:** Kortney Petry, Ball State '11 *(Ext 117)*
- **Area 4:** Liz Vickers, Stetson University '11 *(Ext 114)*
  - Annual Chapter Report Performance
  - Chapter Event Planning
  - Chapter Health Plans
  - Membership and Officer Reporting
  - Membership Concerns
  - Recruitment
  - Retention
  - Risk Management Probation
  - Show Cause Probation

**Member Service Representatives**

The Member Service Representatives are the "Voices of the Heritage Center." They are the customer service representatives who handle many day-to-day activities at the Heritage Center. The Member Service Reps can answer many of the general requests you may have.

**Member Services | Debby Orff**

*Ext 110*

Contact Debby about:
- Address changes
- Charters
- E-Mail Addresses
- Initiate Certificates
- Member Processing

**AKPsi Marketplace/Foundation | Hazel Collier**

*Ext 111*

Contact Hazel about:
- Address changes
- Jewelry Orders
- Merchandise Orders
- Officer Updates

**Finances and Collections | Cathy Cole**

*Ext 112*

Contact Cathy about:
- Address changes
- Chapter Account Information
- Chapter Collection Problems
- Invoice and Statement Processing

**Administrative Assistance/Event Registration Services | Judy Pawlus**

*Ext 104*

Contact Judy about:
- Address changes
- Event registrations
- Scholarship applications
Volunteer Fraternity Leadership

Fraternity Board of Directors (BOD)
The fraternity’s board of directors is composed of nine alumni members elected by the Chapter Congress for terms of three years. The board in turn elects its officers who are the chairman, vice chairman, treasurer and secretary. The responsibility of the board of directors is to set policies and procedures that will guide the fraternity into the future. It acts as the supreme governing body of the fraternity between meetings of the Chapter Congress. It is charged with approving the fraternity budget, setting annual goals of the fraternity, overseeing the performance of the CEO and, most importantly, strategic planning. In strategic planning, the board takes input from members through a variety of sources and determines the fraternity’s core values, its vision for the future, or in laymen terms — what does Alpha Kappa Psi want to be known for? Further, it is charged with the responsibility of measuring how programs assist chapters and members to reach the vision. The board is the “big picture” strategic thinker of the organization much like the board of a corporation. The chairman of the board is the highest ranking volunteer in the fraternity.

Management Team (MT)
The Management Team is the volunteer operational arm of the organization. It is composed of the fraternity president, executive vice president, four area vice presidents and 16 regional directors. The Management Team is charged with the responsibility of servicing the chapters of the fraternity within the guidelines of policies and procedures set forth by the board of directors. The Management Team also manages a vast number of fraternity alumni volunteers, such as regional managers, section directors, chapter advisors, and chapter advisory board. The fraternity president serves as the chairman of the Management Team, presides over meetings of the Chapter Congress and appoints operational committees. For a current list of officers and regional directors visit www.akpsi.org/mt.

- **The President and Executive Vice President** administer the important work of appointing, charging and monitoring committees; overseeing implementation of budgets, resource materials, and educational programs approved by the Board of Directors. The president may appoint a cabinet of volunteers for assistance (as approved by the Board of Directors).
- **The Area Vice President** is tasked with the administrative oversight of specific Regions/Regional Directors and for executing the tactical direction of Fraternity operations based on strategic guidance from the Board of Directors (BOD) while partnering with the Fraternity Staff
- **The Regional Directors** are responsible for leading and supervising their regions. They appoint regional management team members, run their regional officer training, attend conventions, and do other things that make the regional director position the undisputed toughest volunteer position in the fraternity.

Foundation Board of Directors
The Alpha Kappa Psi Foundation, founded in 1951, is a not-for-profit 501(c)(3) organization dedicated to promoting the ideals of AKPsi. Its mission is: providing resources for enhancing the educational experience of future business leaders. The governing body of the foundation is its board of directors. It is charged with the responsibility of setting polices, fundraising goals and plans, an operational budget, and the overall vision of the foundation. A professional staff oversees day-to-day activities. The foundation funds the Academy, All-AKPsi Academic Team, Case Competition award scholarships and numerous scholarships. So the fraternity can have quality speakers at its events (such as the Principled Business Leadership Institute or the College of Leadership), the foundation also underwrites expenses for many speakers through its Principled Business Leadership Fund.
Foundation Scholarships
Academy, Late June (all expenses paid):
The Academy is like no other Alpha Kappa Psi educational experience. It is an intimate, hands-on, challenging leadership development retreat. It is a unique program designed especially for those who demonstrate exceptional qualities for future business leaders. A limited registration cap and a remote location ensure that the experience is highly interactive. Through the generous support of Alpha Kappa Psi alumni, friends and Corporate America, the AKPsi Foundation pays all expenses for those attending the four-day experience.

Application deadline: Spring

All-AKPsi Academic Team:
The All-AKPsi Academic Team recognizes students who maintain excellence in academic standing while making positive contributions to their campus and community. The selection process measures an applicant's ability to balance the pursuit of a degree with the development of leadership skills, interactive extracurricular participation, and a sense of social responsibility. From among the team members, one or more outstanding individuals receive the Top Scholar Award and are recognized with educational grants.

Application deadline: Fall

Scholarships:
There are more than 30 scholarships available to Alpha Kappa Psi members. Some of these scholarships may have certain requirements. Visit akpsi.org for a current listing of chapter and Fraternity-wide scholarships.

Case Competition:
Through the foundation’s Case Competition, students are introduced to the realities of decision making – including incomplete information, time constraints and conflicting goals – giving them first-hand experience in analyzing business situations. The competition was designed to stimulate students’ thinking by challenging their capabilities and preparing them for future managerial decision making.

Leadership defined: Leadership is the art of mobilizing others to want to struggle for shared aspirations.
– The Student Leadership Challenge by Jim Kouzes and Barry Posner

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“I learned that a great leader is a man who has the ability to get other people to do what they don’t want to do and like it.” –Harry Truman
Characteristics of a Leader
Are you a leader? Here is a brief list of leadership characteristics:

- Leaders are good teachers and great communicators.
- Leaders have stamina.
- Leaders do what they know is right, rather than what is popular.
- Leaders are good at managing time.
- Leaders do not condone incompetence, they replace it.
- Leaders are reliable and open-minded.
- Leaders are good listeners.
- Leaders act with integrity.
- Leaders inspire a vision.
- Leaders are trustworthy and able to trust others.
- Leaders subordinate their egos to the goals of the chapter.
- Leaders know how to run meetings.
- Leaders teach all members the basics of chapter operations.
- Leaders help establish realistic goals and set action plans for reaching these goals.
- Leaders successfully motivate members on the importance of reaching goals.
- Leaders recruit competent people.

Spotting Leadership Potential*
1. Future leaders show initiative and can resolve issues with minimal supervision instead of waiting around for constant direction.
2. Future leaders trust their own judgment and get on with the task at hand, taking responsibility and without fear of making mistakes.
3. Future leaders are thirsty for knowledge and seek mentors and role models as they understand there is much to learn.
4. Future leaders share their knowledge, recognizing that the more they give the more they receive in return. Knowledge hoarders do not make good leaders.
5. Future leaders accept they are not perfect and do not know everything, that they have limitations and do not know and cannot do it all. They are not afraid to show weakness.
6. Future leaders accept responsibility for their own mistakes. Taking ownership and taking risks increases the chance of error. Leaders admit, learn and move on without making excuses.
7. Future leaders take responsibility and don’t single people out or shift blame. Whilst any error is still acknowledged, it is ‘ours’ not the fault of an individual.
8. Future leaders inspire and bring out the best in others as their passion and drive are contagious and set the standard for others to aspire to.

Anyone who exhibits more than half of the traits listed above could be one of your emerging leaders and offered the training and development they need to maximize their capabilities.


“It’s a fine thing to have ability, but the ability to discover ability in others is the true test.”

-Elbert Hubbard
**Life Management**

Student leaders are not only organization leaders but also students, spouses and friends. In short, there is more to student leaders’ lives than the organizations they lead. A key to balancing all the different roles student leaders must take on requires effective use of their time. The following are some brief hints on how to make the most of your time and some suggested personal characteristics of good time managers.

- **List your goals** | Start with long-term goals and then narrow down your short-term goals. Set your priorities, not only for your goals but the roles you must fulfill.

- **Make a daily “to do” list** | Set your priorities every day. This keeps you on track with your short-term and long-term goals.
  - **Start with the “A’s”** | Categorize your list into A, B and C groups, with A being the most important. Then take the items in the B group and redistribute them to the A and C groups. This way you end up with a list of only high and low priorities. However, be careful to not ignore C items; if they are forgotten about they can turn into urgent A priorities.

- **Always ask yourself ...** | “What is the best use of my time right now?” Do this whenever you have a free moment.

- **Handle each item just once** | If you pick up a piece of mail or receive a note, handle it then and there. Do not set it down before you resolve it, even if that means making a note to yourself to handle it later.

- **Do it NOW** | Do not procrastinate. Remember every big project is just a lot of little projects put together. Take each element one at a time.

- **Delegate** | Give tasks to other people so they can help.

**Motivation**

How can one promote a higher level of intensity within the chapter? It’s EASY; just follow these 5-steps:

1. **Strive to create a strong sense of belonging** for everyone involved in the group; the members should feel as if they are honestly needed for whom they are.

2. **Foster discussion with the group** to set clear and precise goals/objectives for the chapter and ensure progress is communicated and celebrated.

3. **Establish a definition of what is expected of each brother** so they realize the expectations others have of them.

4. **Assign responsibilities challenging others within a range of abilities and interest**. These should be responsibilities which contribute to reaching the goals/objectives.

5. **Observe the progress of the chapter toward completing the goals/objectives**.

When motivating others, remember and understand their personal values may be different than yours. What makes sense to you may not make sense to them. By trying to see something from another person’s point of view and empowering brothers to do what they are passionate about will help the brother and the chapter grow.
**Specific** - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:
- **Who:** Who is involved?
- **What:** What do I want to accomplish?
- **Where:** Identify a location.
- **When:** Establish a time frame.
- **Which:** Identify requirements and constraints.
- **Why:** Specific reasons, purpose or benefits of accomplishing the goal.

**EXAMPLE:** A general goal would be, "Get in shape." But a specific goal would say, "Join a health club and workout 3 days a week."

**Measurable** - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as......How much? How many? How will I know when it is accomplished?

**Attainable** - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals. You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

**Realistic** - To be realistic, a goal must represent an objective toward which you are both willing and able to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love. Your goal is probably realistic if you truly believe that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

**Timely** - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.
The following action items will ensure your term starts off on the right foot. As a chapter officer, it is important that you are familiar with all the resources available to you and the chapter. These resources include materials produced by the Fraternity and local resources (volunteers, alumni) near your chapter. The key to a successful chapter is recognizing how much you can do and when to ask for help. There are thousands of alumni and volunteers who have been in your shoes and are willing to help. Use their experiences to enhance yours!

**Action Items:**
- Read this officer manual. You must know your duties and those of your fellow officers.
- Study the chapter Bylaws.
- Review the *Board of Directors’ Statement of Policy*. Pay special attention to the Risk Management policies. All of these are essential to a healthy chapter and are each officer’s responsibility.
- Review the Constitution and Statutory Code.
- Become familiar with Robert’s Rules of Order.
- Review the Ritual of Alpha Kappa Psi (version 8 or higher).
- Know the fraternity’s vision, core values and guiding principles.
- Log-in to [www.akpsi.org](http://www.akpsi.org) to set-up a profile and become familiar with how to use the chapter reporting tools.
- Read the *Road to Brotherhood*; being familiar with it will be essential in order to properly use it as a reference tool.
- Review the Annual Chapter Report (ACR). The ACR allows you to work together with the chapter advisor and Fraternity to track key components of the chapter. The ACR will help you pass on historical information and chapter data to future members, as well as set short and long-term goals.
- Contact the chapter and faculty advisors to set up personal meetings.
- Set a time for weekly executive board meetings.
- Notify the Heritage Center staff, chapter advisor and regional director of any change in officer names for communication purposes. Ensure the chapter’s mailing address is current.
- Become familiar with the resources found at [www.akpsi.org](http://www.akpsi.org).
- Understand the fraternity organizational structure so you can direct your questions to the correct place.
- Have an emergency contact plan so you can contact chapter members in case of emergencies.
- Be professional – you are the role model for the chapter’s behavior.

**General Liability Insurance**

**I. INTRODUCTION**

The purpose of this manual is to give you an understanding of insurance coverage provided and information to properly report all actual and potential liability and property claims with which you may become involved. A certificate of insurance showing proof of coverage is provided with this manual. The final responsibility for the success of the insurance program rests with our fraternity and chapter. It is always important to remember that our first line of defense in liability matters is loss prevention, next is loss control, and the insurance contract is the final line of defense. The undergraduate and alumni members’ willingness to understand and assume the responsibility of sound risk management practices is a cornerstone of our program. In the event that an incident or claim does arise, the Alpha Kappa Psi Fraternity Heritage Center and Willis Insurance, will oversee the effective handling of all incident and claim investigation. An incident reporting form that must be completed and submitted at the time of any incident that results in bodily injury or property damage can be found at [www.akpsi.org](http://www.akpsi.org) in addition to a full insurance and claims manual.
II. LAWSUITS
There will be occasions when lawsuits may be served on a member of your chapter. As there is only a limited
time to answer a lawsuit, the following procedure applies:

a) Treat any potential, actual claim or lawsuit as a high priority item.
b) Utilizing the incident reporting form, note all relevant information.
c) Forward the suit and incident report by U.S. Postal Service Express Mail to the Alpha Kappa Psi
Fraternity, Heritage Center, Attn.: Brian Parker, Managing Director of Operations.

III. GENERAL LIABILITY CLAIMS
The types of General Liability claims can be numerous and usually arise out of conditions of a chapter’s
premises. They more than likely involve injury or damage to someone other than an employee or an officer of
the fraternity. While on the scene, if possible, get all names, addresses and phone numbers of all parties
involved, as well as any witnesses to the accident. Immediately complete the incident reporting form and
submit.

IV. WHAT SHOULD BE REPORTED?
Bodily injury to anyone other than an employee and any property damage for which there is a possibility that a
claim may be made against Alpha Kappa Psi Fraternity. Be sure to fully complete the enclosed incident
reporting form that will provide the needed information regarding the claim. It is imperative that all losses or
incidents be reported immediately to the Alpha Kappa Psi Heritage Center (See phone numbers and address
on below). The Alpha Kappa Psi Fraternity Heritage Center is responsible for providing the initial report of the
claim to HRH/Kirklin & Co, Inc. Once the claim report is sent to HRH/Kirklin & Co, Inc. you will likely be
contacted directly by HRH/Kirklin & Co, Inc. to discuss the incident. If you are unable to obtain necessary
details when first notified of any incident, still report any known facts.

V. INCIDENT/CLAIM REPORTING

<table>
<thead>
<tr>
<th>ATTN: Brian Parker</th>
<th>ATTN: Mick McGill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing Director of Operations</td>
<td>Vice President, Client Advocacy</td>
</tr>
<tr>
<td>7801 E. 88th Street</td>
<td>10707 Pacific Street, Suite 200</td>
</tr>
<tr>
<td>Indianapolis, IN 46256-1233</td>
<td>Omaha, NE 68114</td>
</tr>
<tr>
<td>(317) 872-1553 – Phone</td>
<td>(402) 898-4199 – Phone</td>
</tr>
<tr>
<td>(317) 872-1567 – Facsimile</td>
<td><a href="mailto:mmcgill@willis.com">mmcgill@willis.com</a></td>
</tr>
</tbody>
</table>

VI. GENERAL LIABILITY INSURANCE PROGRAM
The following description is a summary only and is not intended to serve as a substitute for the actual
insurance contract. The Alpha Kappa Psi Fraternity insurance program provides Blanket Public General Liability
Coverage of $1,000,000 per occurrence with a $2,000,000 general aggregate for all participating chapter and
chapter house organizations. (See the end of this section for explanation of types of coverage.) The coverage is
for bodily injury and property damage. This protects the local chapter, its officers and members, the house
corporation and the fraternity, including appointed volunteers, from claims arising out of bodily injury and
property damage occurring at the premises or at chapter functions away from the premises. It also protects
against claims arising out of libel, slander, false arrest, invasion of privacy, eviction from the premises,
consumption of food and beverages and incidental malpractice. It must be understood, however, that our
coverage is for general public liability. It is not accident insurance covering initiated and uninitiated members
for injuries sustained on the chapter premises and/or in chapter activities. Liability insurance is not a substitute
for medical insurance. Further, it is not Workers’ Compensation Insurance, which may be required for chapter
employees such as cooks and housemothers.

Insurer: Liberty Surplus Insurance Corporation
Policy Period: December 1, - November 30
Policy Numbers: DGLCH184369035
Adding Additional Insureds
Additional Insureds may be added to this policy. Such insureds may be your landlord, college, university and/or proprietor from whom the chapter may be renting property for a special event. **Request for an additional insured endorsement should be made in writing at least three weeks in advance of any event** and sent to Alpha Kappa Psi Fraternity Heritage Center, Attn.; Brian Parker, Managing Director of Operations, 7801 E. 88th Street, Indianapolis, IN 46256-1233. Phone (317) 872-1553, Fax (317) 872-1567. Upon approval of the request by the Alpha Kappa Psi Administrative Office and the insurance carrier Willis will issue a certificate of insurance with the original forwarded to the Additional Insured and a copy to the Heritage Center.

What Doesn’t Our Coverage Include?

i. Any claim of bodily injury and/or property damage from an incident resulting when:
   1) An illegal act was performed.
   2) An intentional act was performed.
   3) A contract made by the chapter is broken.
   4) There is any discharge, release or escape of smoke, vapors, soot, fume, acids, toxic chemicals, etc. upon land, the atmosphere of any water course or body of water.
   5) A chapter employee is hurt on the job. Each chapter with any employees must purchase Workers’ Compensation coverage locally.

ii. Any claim of property damage to property owned by, rented by, used by, or cared for by the chapter. An example, the chapter rents a portable generator for an outdoor function, and while it is in the care, custody and control of the chapter it is damaged and the lesser holds the chapter responsible and liable. No coverage is available under the Alpha Kappa Psi Fraternity liability insurance contract.

House Inspections
The insurance company has the right to make inspections and surveys at any time, give Willis Insurance and Alpha Kappa Psi Fraternity reports on the conditions that are found and recommend changes. Any inspections, surveys, reports or recommendations relate only to insurability and the premiums to be charged. Chapters and house corporations will be given advance notification of any inspections and copies of all reports.

Legal and Illegal Activity
Simply stated, no insurance policy in the world provides coverage for violations of the law. The Alpha Kappa Psi Fraternity insurance program is no exception to this rule. The key points to understand are:

- Compliance with federal, state, local and institutional (college or university) laws and regulations is required.
- Compliance with all regulations and policies of Alpha Kappa Psi Fraternity is required.

Those individuals who choose to violate these rules may void the protection for themselves under the Alpha Kappa Psi insurance program. **Every effort has been made to avoid their actions from jeopardizing the other members, other entities, or other named insureds protected by the Alpha Kappa Psi program.** The following brief examples are intended to provide illustration and do not represent legal advice.

i. With the broad awareness of its membership, the chapter serves alcohol to a minor in violation of the law at a chapter-sponsored function. In the event of an injury, claim or lawsuit, those persons found to be in violation of the law and/or Alpha Kappa Psi Policy (in this case the entire chapter) most likely would be without insurance protection. The other named insureds would be protected (i.e. the Fraternity, house corporation or alumni volunteers).

ii. Two of the members of a 65-man chapter cause injury to someone in connection with a hazing incident. This activity was unauthorized and done secretly without the knowledge of the chapter,
and strictly against chapter policy. In the event of an injury, claim or lawsuit, those persons (in this case, the two members) found to be in violation of the law and Alpha Kappa Psi Policy could be without insurance protection. The chapter, house corporation and other named insureds would be protected.

Great effort has been made to ensure coverage will be provided to those individuals and entities exposed to claims through no fault of their own. Chapters and chapter officers are protected from the unauthorized actions of individuals. The assets of house corporations are protected from the unauthorized actions of their chapters. Chapter Advisors are protected from the unauthorized actions of their individual chapter members and the chapter as a whole, as are the house corporations and all other appointed alumni volunteers involved with the Fraternity.

All questions regarding insurance interpretation and coverage should be directed to Willis Insurance. c/o Trude Smouse, 10707 Pacific Street, Suite 200, Omaha, NE 68114, Phone (800.736.4327, email smouset@willis.com.

**Hazing Policy**

Alpha Kappa Psi’s Hazing Policy can be found in the *Board of Director’s Statement of Policy* and online at [www.akpsi.org](http://www.akpsi.org). It shall be the responsibility of all members of Alpha Kappa Psi Fraternity to determine college, university or other legal jurisdiction policy regarding hazing, mental or physical, and to comply totally with such policies.

**Hazing Prevention**

When organizations are challenged to eliminate hazing practices, some members are often resistant to this change. In many cases, those who are most vocal against eliminating hazing are those who are upset about the hazing they themselves endured (but don’t admit this publicly) and expect others should be “abused” as well in order to gain “true” membership in the group just like they did.

Of course, if you try to eliminate hazing in your chapter, you will likely encounter many elaborate reasons for why this will be devastating for your group. While there will be some staunch supporters of the status quo, there will be many who can be convinced of the negative effects and potential risks of hazing. Believers in the supposed “benefits” of hazing may be more likely to change their opinion if they can envision some alternatives. The following are supposed benefits hazers believe they accomplish and some alternatives you can instill in your chapter that will accomplish the same goal:

- **Foster unity:**
  - Brother retreat.
  - Visit a ropes course to work on group cohesiveness, communication and leadership skills.
  - Non drinking socials to learn about each other.
- **Develop problem-solving abilities:**
  - Have discussions about chapter weaknesses such as poor recruitment, apathy and poor scholarship, and develop solutions the chapter might then adopt (i.e. create a business plan).
  - Do groups for rituals so they can work under a deadline.
- **Teaches you to work under stress:**
  - Prepare a challenging fundraiser and see it through to the end.
  - Have an interview workshop to prepare you better for tough interviews.
- **Develop leadership skills:**
  - Encourage participation in school/campus activities outside of the chapter.
  - Encourage new members to get involved in committees and/or leadership roles.
  - Develop a peer mentor program within your group for leadership roles.
- Invite school/community/business leaders into the chapter to share their experiences.
- Instill a sense of membership:
  - Start new traditions ~ it only takes a few academic terms for it to become a tradition.

Believe it or not:
Chapters found responsible of hazing have been required to eliminate hazing in order to stay open as a chapter of Alpha Kappa Psi. These chapters report that eliminating hazing increased member involvement therefore reducing apathy!

**Parliamentary Procedure**

**Basic Principle: Minority is heard but majority rules**

I. **Establish a quorum**
   A quorum is the number of people who must be present to take legal action on business matters and is essential to conducting business meetings. The quorum is stipulated in the bylaws, and before any business is discussed, the chair should establish for the record that a quorum exists.

II. **All members have equal rights**
    These include the right to make motions, debate, and vote. You need a two-thirds majority vote to deprive members of basic rights — such as closing or limiting debate and closing nominations. No member may be forced to vote, silence gives consent. General business — majority of those present

III. **Debate, decorum, and order**
    Only one main motion (one subject) may be considered at a time, and only one person may speak at a time. Anyone who wishes to make a motion should first be recognized by the chair and preface the motion with the words, “I move that.” If someone wishes to second the motion, that person does not have to wait to be recognized but merely calls out, “I second the motion.” Without a second motion, the chair moves on to the next agenda item. After the motion has been made and seconded, the chair restates the motion, which is termed a main motion. Discussion begins. To ensure order and that only one person speaks at a time, the chair recognizes members before they may speak. There must be an opportunity for at least one pro and one con for each motion and amendment. Technically, after a second is made, a motion cannot be withdrawn (not efficient to enforce).

IV. **Amendments**
    The purpose of an amendment is to change a motion already under consideration. If a member believes the right topic is being discussed but wants to modify the wording of the motion, he or she calls for an amendment. Technically, a motion may be amended, and the amendment to the motion may be amended, but no further amendments may be made. Amendments are motions, and as such, they require a second and full debate. Amendments can slightly change the main motion. Typically, if the author of the original motion agrees with the amendment it can be accepted as a “Friendly Amendment” and incorporated into the original motion without the need for debate or a vote.

V. **Closing Debate**
    A member who wishes to end debate may interrupt discussion and say “I move/call the previous question.” This motion requires a second and must receive a two-thirds majority vote. Should it receive a two-thirds majority, the chair then states, “The previous question has been called, all those in favor of the motion to...”

VI. **How to Run a Meeting**
    A. Decide how strict to be with parliamentary procedure — generally, the larger the group, the more strict you should be.
B. How will one be recognized to speak? — typically by raising your hand then being called upon by the chair. Large assemblies may have fixed microphones where lines are formed to speak.

C. Chair controls flow of meeting.
   i. Must appear unbiased, can never state an opinion on the motion before or during debate.
   ii. To be effective, must control flow of meeting by:
   iii. Quickly and decisively granting permission to speak.
   iv. Always watching that comments are being made at the appropriate times (a pro should be a pro, not a public service announcement; points of information should be questions not pros/cons). Always stop someone and ask him or her to explain his/her point if it sounds like the granted time is being appropriately used (if it sounds like someone is making a con during a point of information).
   v. Quickly and decisively making judgments on points of order.
   vi. Prompt for actions if meeting slows down (chair will entertain motion to _____ — such as close debate, open a window, consider “X”).
   vii. Don’t be afraid to take a recess if you need to clarify points or get some information.
   viii. Be quick to keep people in order (not speaking out of turn).
   ix. Don’t let debate get personal — name-calling is not allowed (try to get people to speak in the third person when referring to other people in the room and to address actions not people).

D. Use other resources — Warden, Parliamentarian, etc.

VII. Efficiency Tips
   A. Most motions can be voted on by acclamation (general consent).
   B. Use voice vote for motions. Chair’s ruling stands on results of voice vote unless “call for division” is called for, then vote count is needed.
   C. Chair cannot make motions but can offer to “entertain” a motion which may fix a particular sticking point in debate.
   D. If chair doesn’t know the answer to a “point of information,” he or she can call on someone else to answer it.

VIII. Potential Problems
   A. Noisy individual — warning from chair then warden removes.
   B. Bad environment (hot, cold) — chair can recess meeting to try remedy the situation.
   C. People speaking without being recognized — reminder from chair to wait to be recognized, if doesn’t work, warning from chair then warden removes.
   D. Debate lasting too long — “without objection, chair ends debate after two or more pro/cons.” (Two of the same back-to-back.)
   E. Meeting lasting too long — “without objection, chair rearranges agenda and will postpone consideration of certain items until next meeting.”
   F. Everyone wants to speak — in the order they raise their hands, a list is made, chair simply calls names off this list.

*Adopted from Parliamentary Procedure: A Few Rules Help Keeps Order, by Kathy Gill*”
### Parliamentary Procedure at a Glance

Here are some motions you might make, how to make them, and what to expect of the rules.

<table>
<thead>
<tr>
<th>To Do This:</th>
<th>You Say This:</th>
<th>May you interrupt the speaker?</th>
<th>Do you need a second?</th>
<th>Is it debatable?</th>
<th>Can it be amended?</th>
<th>What vote is needed?</th>
<th>Can it be reconsidered?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADJOURN MEETING</td>
<td>&quot;I move that we adjourn&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>CALL AN INTERMISSION</td>
<td>&quot;I move that we recess for...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>COMPLAIN ABOUT HEAT, NOISE ETC.</td>
<td>&quot;I rise to a question of privilege&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No (usually)</td>
</tr>
<tr>
<td>TEMPORARILY SUSPEND CONSIDERATION OF AN ISSUE</td>
<td>&quot;I move to table the motion&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>I CALL QUESTION END DEBATE AND AMENDMENTS</td>
<td>&quot;I move the previous question&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>POSTPONE DISCUSSION FOR A CERTAIN TIME</td>
<td>&quot;I move to postpone the discussion until...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>GIVE CLOSER STUDY OF SOMETHING</td>
<td>&quot;I move to refer the matter to committee&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>AMEND MOTION</td>
<td>&quot;I move to amend the motion by...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>INTRODUCE BUSINESS</td>
<td>&quot;I move that...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**THE MOTIONS LISTED ABOVE ARE IN ORDER OF PRECEDENCE... BELOW THERE IS NO ORDER...**

| PROTEST BREACH OF RULES OF CONDUCT | "I rise to a point of order."                     | Yes                            | No                     | No               | No                  | No Vote              | 4                      |
| VOTE ON A RULING OF THE CHAIR      | "I appeal from the chair's decision"              | Yes                            | Yes                    | Yes              | No                  | Majority             | Yes                    |
| SUSPEND RULES TEMPORARILY          | "I move to suspend the rules so that..."          | No                             | Yes                    | No               | No                  | 2/3                  | No                     |
| AVOID CONSIDERING AN IMPROPER MATTER | "I object to consideration of this motion"       | Yes                            | No                     | No               | No                  | 2/3                  | 6                     |
| VERIFY A VOICE VOTE BY HAVING MEMBERS STAND | "I call for a division" or "Division!"       | Yes                            | No                     | No               | No                  | No Vote              | No                     |
| REQUEST INFORMATION                | "Point of information."                          | Yes                            | No                     | No               | No                  | No Vote              | No                     |
| TAKE UP A MATTER PREVIOUSLY TABLED | "I move to take from the table..."                | No                             | Yes                    | No               | No                  | No                   | Majority              |
| RECONSIDER A HASTY ACTION          | "I move to reconsider the vote on..."             | Yes                            | Yes                    | Yes              | 6                  | No                   | Majority              |

**NOTES:**

1. Unless vote on question is not yet taken.
2. Unless the committee has already taken up the subject.
3. Only if the motion to be amended is.
4. Except in doubtful cases.
5. A majority vote in negative needed to revisit ruling of chair.
6. A 2/3 vote in negative needed to prevent consideration of main motion.
7. Only if the main question or motion was not, in fact, considered.
8. Only if motion to be reconsidered is debatable.
Recruitment is 365. Your role is not limited to a two-week period each academic term where the chapter accepts new members. Through proper planning, you will set the chapter up for membership sustainment. The following items will help you get started in the appropriate manner:

- Attend the weekly executive board meeting.
- Responsible for overseeing recruitment and the pledge program.
- Communicate well with pledge educators.
- Initiate a discussion about the pledge class during student member meetings.
- Ensure the chapter is following the fraternity-approved pledge program - PEP. The program can be downloaded online at www.akpsi.org/pep. Each chapter is required to follow the minimum standards as outlined in the Pledge Educator Guide.
- Check with the master of rituals to ensure there are enough pledge pins PRIOR to pledge induction.
- If you must reserve rooms on campus for pledge education meetings, coordinate with the president and master of rituals who also must reserve rooms.
- Fill out the chapter’s Recruitment Plan and submit to the chapter advisor, section director and regional director each term.
- Follow up to ensure pledges and initiates are properly reported.
- Set up the recruitment events for the chapter.
- Get the ENTIRE chapter and alumni involved with recruitment!
- Recruit year-round. Always be recruiting!
- Conduct a recruitment clinic prior to the start of recruitment.

Planning for Recruitment and the Pledge Education Program

The vice president of membership is responsible for recruiting the future for the chapter. However, it cannot be achieved successfully without the ENTIRE chapter’s help. A good vice president of membership must be organized, dedicated and motivated.

The vice president of membership should have a calendar of chapter events including induction, pledge education, Big Brother/Little Brother functions, pledge professional, social, or service function and initiation. To help you plan, you should read the past officer documentation, the PEP Manual, the Constitution and Statutory Code, and the chapter Bylaws.

Most importantly read the Road to Brotherhood, especially concentrating on “Securing the Future” and “The Pursuit of Brotherhood.” These sections will guide you through recruitment as well as the pledge education program. Although your chapter might have a solid program for recruitment and pledge education, the Road to Brotherhood will enhance those programs to be more impactful.

As vice president of membership you are also responsible for filling out the recruitment plan for the chapter each academic term. It is extremely important recruitment is thoughtfully planned out months in advance. The Recruitment Plan template can be found at https://www.akpsi.org/forms. After completing the Recruitment Plan forward it to your chapter advisor, section director and regional director. They will be able to provide valuable feedback.

When setting membership goals it is extremely important to get buy-in from the members of the chapter. You’ll need their assistance to meet these goals. The Road to Brotherhood covers setting recruitment goals extensively.
**What is my part?**
Each individual plays a small, but significant part in a chapter’s recruitment program. Listed below are several ideas to get you moving in the right direction. If you need additional ideas or assistance please call your chapter advisor, section director, regional director or the Heritage Center.

Have you ever thought of all the benefits of having a successful recruitment campaign? Greater participation, more revenue and a broadening of your network are just a few reasons to organize your chapter’s efforts. Starting the term with a successful recruitment raises the morale of the brothers and carries over to other programs. Successful recruitment programs work due to careful planning and the involvement of all brothers. Specifically defining what you offer to your members and knowing what you look for in potential members are the first steps you must take.

**Things to do**
- Know your regional objectives and projected goals for your chapter.
- Review the *Road to Brotherhood*.
- Review all PEP materials.
- Conduct an education session involving the entire chapter and chapter advisor.
- Establish specific characteristics you desire in prospective brothers.
- Ensure your recruitment period and pledge education program are well organized.
- Focus on both recruitment and retention. Strive for fraternity awards.
- Have a backup plan if your chapter fails to reach the objective.
- Identify every brother’s role in the recruitment process. Include everyone.
- Create an atmosphere of excitement... think membership.

**Sample Recruitment Workshop**

*Five Steps to Organizing Your Chapter for Recruitment Success*

**Needed Materials:** markers, flip chart, masking tape

**Directions:** Guide the chapter through each of the following steps by leading the discussion and emphasizing the following points. Have the students practice all the points in the Making Friends 101 section.

**Step 1 - Organization and Overview**
1. The entire chapter must take responsibility for recruiting new members. A good workshop will include everyone. The workshop should take about 90 minutes.
2. The recruitment process is a year-round effort. Workshops should be held each term prior to the major recruitment efforts of the chapter.
3. Recruitment is nothing more than making new friends. The workshop should highlight the benefits of membership and basic conversation skills. The workshop should also serve as the event to get everyone on the same page.

**Step 2 - Knowing What You Want**
1. The first step to successful recruitment is identifying what you are looking for in a potential member. On a piece of flip chart, brainstorm the characteristics you want in prospective members. Your list might include: aptitude for leadership, fiscally responsible, academically minded, etc. Using your list of attributes, define for the group the perfect pledge.
2. How many new members do you want? It is important to set 'stretch' goals. Your membership goal should be high, but realistic. Don't limit yourselves by what you've done in the past, now you have a plan! A successful recruitment effort motivates the entire chapter.

3. Now get your creative juices flowing! Where are the perfect pledges? What other organizations do they belong to? Where do they hang out on campus? What is the best way to contact them? Personal one-on-one contact is better than any flyer, poster or brochure.

4. Place these lists to the side; we've only just begun. Hang them on the wall so that the brothers can keep in mind what our newest members look like.

Step 3 - The Benefits of Membership

1. On a clean sheet of flip chart paper, have the chapter brainstorm all the benefits of membership. Your list might include: professional programming, special events, close friendships, etc. Don't forget Fraternity-sponsored educational programming like the Academy, Principled Business Leadership Institute and Convention! Write down as many ideas as you can. This becomes your sales sheet.

2. Who is your competition? Are there other business fraternities on campus? Professional organizations, leadership opportunities? How does your chapter stack up? If your ‘product’ needs work, be honest. If you have challenges, present them as opportunities.

3. Now is a great time to look at your strengths and weaknesses. If you are candid with prospective members, they do not join with false expectations.

Step 4 - What Prospective Members Are Looking For... And How to Deliver It!

College students ask four basic questions during their collegiate career. By showing AKPsi as the answer to these questions, you give quality men and women a reason to join.

1. **Question one: Will I succeed academically?** If your chapter has a program in place to ensure academic success, share it! If you don't, get on the ball. One of the benefits of brotherhood is that we work together to better one another. If academics are important to your chapter, you will recruit the top students.

2. **Question two: Will I make friends?** In many ways, this is the purpose of fraternity. Making friends and developing close relationships that last a lifetime, are powerful motivations that will appeal to many students at the beginning of their collegiate career. Students looking to enhance their resumes will look for an opportunity to do so in an environment with fun, friendly people.

3. **Question three: Can I make a difference?** If you want people to join, get involved and stay involved, show them how their participation will benefit them and the chapter at the same time. Find their interests and show how their skills are important to the overall success of the chapter.

4. **Question four: What is the benefit to me now and in the Future...?** Let’s face it; today’s students are busy people. Time is the great resource. If you want involvement by the top students, you have to be able to demonstrate how their involvement will help them reach their goals today and in the future. What can the chapter do for me today? What about when I am getting ready to graduate?

Step 5 - Organize Opportunities to Put Your Best Foot Forward

1. Take the lists you’ve created. Who are the students you’re looking for? What are THEY looking for? Now answer the question, "How are you going to get them?" What events are going to attract the students you want to be members? What promotional materials do you have available? How do you create comfortable environments for one-on-one conversation?

2. Professional events must be professionally organized. If you are going to promote yourself as a professional organization — deliver what you say! Make sure your image is reflected in your promotional materials. Be organized, focus on the details and the big picture will come together. Utilize
the talents of all your brothers; everyone must play a part in each event. It is not the responsibility of the Vice President of Membership to do all the work.

**Making Friends 101**

1. Make a new friend. Develop a good handshake, an enthusiastic smile and a warm, welcoming attitude.
2. Introduce them to your friends, match individuals with common interests and similar backgrounds.
3. Introduce them to your fraternity. Be passionate, answer the four common questions, and get them involved.
4. Ask them to join. Show how they can make a difference. Ask them to join. If you don’t ask—they won’t offer!

*Making Friends 101. Inspired from materials from the North-American Interfraternity Conference*
Dear Brothers,

As we approach recruitment this semester, there are some important guidelines to remember when interacting with pledges. Pledges are the lifeblood of this chapter and without them, it has no future. So it is important to secure our livelihood by treating our pledges with the respect and dignity they are due.

The only difference between a brother and a pledge is that the pledge is trying to meet the requirements for admission, while the brother has met them. This does not make the pledge a lesser class of person, nor does it make the brother superior. While individual officers have responsibilities to the pledges, the entire membership has duties as well.

All brothers must adhere to Alpha Kappa Psi’s Board of Directors Hazing Policy which states:

- Hazing activities are generally defined as any action taken or situation created, intentionally or unintentionally, whether on or off fraternity premises, to produce physical or mental discomfort, embarrassment, harassment, or ridicule or possibly cause physical harm or injury.
- There shall be no pre-initiation activities on the day or evening prior to the day of Court of Honor or Ritual Initiation that would cause persons to be physically or mentally fatigued.
- Activities during the pledge education period shall be limited to those which attempt to increase the person’s knowledge of the Fraternity and the person’s professional intent; these activities must be carried on in a dignified manner and must show proper respect for another person as a professional equal.
- At no time during pledge education is there to be verbal abuse of an individual, including shouting, screaming and the use of profanity.

Hazing will not be tolerated in Alpha Kappa Psi. Anyone identified as hazing will be dealt with very severely. We are a professional business fraternity with high standards and ideals to present to our pledges.

Be supportive to the pledges at all times. Do not do anything to discourage or offend our pledges, or go out of your way to be difficult with them. They will be busy enough fulfilling the requirements of pledging without having unnecessary obstacles in their way. Just remember how challenging it was when you were a pledge. Do your best to make yourself known to them and attend as many events as you can. Always maintain a professional attitude with the pledges. If you do notice a problem with a pledge, speak to his/her big brother, a pledge educator, or the VP of membership.

You have the honor of molding and shaping our future members. You will benefit from making this a memorable time for our pledges by practicing your mentoring abilities, developing your training skills, and increasing your network of brothers. This will be a busy semester filled with great rewards for everyone. Enjoy!

In U-- & I--,

The Executive board
**Membership Retention Ideas**

Recruitment of new members is important, but do not forget the importance of keeping your current members satisfied!

1. Work to make AKPsi the premier leadership/business organization on campus.
2. Everyone has a job. Form a working committee system.
3. Teach members to prepare for an interview.
4. Survey your members regularly.
5. Assist brothers with academic concerns.
6. Provide career identification assistance.
7. Don’t make anyone do anything embarrassing.
8. Give members real responsibility and an opportunity to grow and learn.
9. Meetings must be fun and productive!
10. Membership has its privileges. What are they in your chapter?
11. Help brothers find a job.
12. Provide an opportunity for the group to talk one-on-one with the dean of the school of business.
13. Help brothers prepare for the GMAT.
14. Pair new members with a good big brother — someone with whom they have something in common.
15. Let members meet local alumni.
16. End meetings on time.
17. Give lots of positive feedback.
18. Teach the entire chapter the history — don’t just tell the pledges to memorize it.
19. Let everyone know what is expected up front.
20. Tell pledges about the Mid Court and the Court of Honor from the beginning.
21. Get involved with Junior Achievement.
22. Don’t request anyone do anything illegal or immoral.
23. Respect the fact that people have other responsibilities besides AKPsi.
24. Demonstrate what true brotherhood is.
25. Teach brothers to network.
26. Assist members in getting into graduate school.
27. Explain to brothers where their money goes.
28. Arrange a group trip to PBLI, College of Leadership or Convention.
29. Allow pledges to participate; then recognize their contributions.
30. Set up study sessions for tough classes.
31. Get involved with the Chamber of Commerce.
32. Make brothers feel involved in the governance of the school of business.
33. Have a parents brunch to “show off” the organization.
34. Assign an ‘Academic Big Brother’ to everyone.
35. Get everyone involved with the chapter’s intramural teams.
36. Teach brothers how to speak and write effectively.
37. Show brothers how to reach their full potential.
38. Expect a professional attitude from all members, all of the time.
39. Appoint assistant officers.
40. Teach brothers to run a meeting with confidence.
41. Assign an older member to help new initiates stay involved.
42. Listen to ideas from the new members.
43. If an idea is not adopted, tell the originator why.
44. Give weight to the fact that people carry out best their own ideas.
45. Leaders set the stage for members’ actions. Leaders lead by example.
46. Social events should always be responsible events.
47. Help each brother create something new for the chapter or their individual development.
48. Let brothers work on the projects they like to do.
49. Have fun.
50. Start a mentoring program.
**Frequently Asked Questions**

**What due dates do I need to know?**
The most accurate and up-to-date due dates for your chapter are listed on [www.akpsi.org](http://www.akpsi.org). Check out the Calendar of Chapter Due Dates for the most up-to-date calendar planning.

**When are the chapter minutes due?**
Within seven days of your meetings. The Executive and Chapter Minutes are to be sent to the CA, SD and RD. All minutes should be sent to chapter members with 24 hours of the meeting.

**What if the chapter roster is inaccurate?**
Correct it immediately by logging into the chapter reporting tools at [https://www.akpsi.org/cmt](https://www.akpsi.org/cmt). Remember your dues and insurance billings are based on your roster.

**Can first-year students pledge?**
There is not a minimum GPA to pledge Alpha Kappa Psi, therefore freshman can pledge. Refer to the [Statutory Code](http://www.akpsi.org/cmt) (Caput II Section 6) for more information.

**Is there an inactive status?**
No, circumstances such as internships, co-op, student abroad, military duty or medical/extreme hardship are considered for Leave of Absence status. Special exceptions have been made for those who are extremely ill, pregnant, etc., but approval is required by your RD. These members must be reported as Leave of Absence and they are to re-affiliate (and be reported as doing so) upon their return. There are NO “social memberships,” “senior status,” etc. Leave of Absence status is different than suspension due to attendance issues and/or financial delinquency.

**How can a member be removed in good standing?**
Only by leaving the university; this could be because they “drop out” of school, graduate with the degree in which they pledged (even if they stay on for grad school), transfer to another school or branch of your school (more than 50 miles).

**Are there any circumstances when the brother must re-affiliate?**
Yes, if the brother returns to the university at which their home chapter is located to complete the degree in which they pledged. (Examples of this would include conclusion of internships, co-op, and medical leave of absence.)

**What are the different membership forms?**
Chapter rosters can be updated online using the Chapter Management Tools at [http://www.akpsi.org/cmt](http://www.akpsi.org/cmt). Once you update your roster online, an e-mail is automatically sent to you confirming these changes have been requested. A second email will be sent once the changes are approved by the Heritage Center. Any officer currently reported to the Heritage Center can access the Chapter Management Tools.

- **Report Pledges** – Reporting of all new pledges. Information required: Full name, address, phone, e-mail address, date of birth, expected graduation year, induction date and expected initiation date. Download the [Pledge Information Collection Form](http://www.akpsi.org/cmt) and have the pledges fill one out for easier input into the website. Due within seven business days of induction.
- **Report Initiates** - Reports your new brothers. Due within seven business days of initiation.
• **Chapter Roster Management** – Report status changes (graduating seniors, suspended brothers, leave of absences) and officer changes (incoming and outgoing officers; must be one of seven positions found in the Constitution; President, VP of Membership, VP of Admin, VP of Alumni Relations, Treasurer, Secretary, and MOR). A reason must be given for each suspension and Leave of Absence.

• **Member Reinstatement Form** – Reports brothers reinstated from temporary removal; also used to report affiliation of a brother who transfers from one university to another and joins the chapter.

**Can a brother resign from the fraternity?**
The membership of a member of the fraternity shall terminate upon the receipt of the member’s written resignation by the CEO of the fraternity or upon the member’s death. Any resignation does not relieve the member of any obligation incurred or commitments made before the resignation. (*Constitution, Article II, Section 8D*). Chapters cannot resign their members, members can only resign themselves.

A brother who resigns cannot attend any fraternity meetings, rituals or events and should not refer to his or her former membership or fraternity experiences in any document, such as résumés, employment applications, or job interviews.

**Can a chapter purchase alcohol?**
It cannot! See the risk management policies in the *Board of Directors Statement of Policy*.

**What is the chapter’s fiscal year?**
Per the *Constitution and Statutory Code* each chapter shall follow the fiscal year of April 1 – March 31. NO EXCEPTIONS.

**What is an audit and when should it be done?**
It is a review of all income and expenses and serves to ensure to the chapter, the outgoing treasurer and the incoming treasurer all funds have all been properly accounted for and any questions are resolved in a timely fashion. It should be done at the end of the treasurer’s term by the audit committee, should not include the treasurer and preferably will include at least one faculty/alumnus/CPA. A copy of the chapter audit is due to the Heritage Center by May 31 of each year after the conclusion of the chapter fiscal year (March 31). Chapters are encouraged to reference the *Chapter Audit Manual* for assistance.

**What are officer evaluations and when should they be done?**
Officer evaluations are an opportunity for the brothers to give the officers of the chapter feedback and constructive criticism on themselves in several categories. Some chapters do this once an academic term (after the first third of the term); others do it twice an academic term (at the 1/3 point and at the 2/3 point). It should be stressed that this is not personal and should be used as an anonymous way to help each officer grow and develop on a professional level. A sample officer evaluation can be found in the *Road to Brotherhood*.

**What is an incident report and when do I send one?**
An incident report is filled out whenever a negative event occurs, especially one which could result in legal issues, whether a lawsuit or police or judicial action. Examples are anytime the “authorities” (police, ambulance, univ. etc.) are involved. Even if you think it will “go away,” you should document it! Always consult with the RMT if there is even a question. When in doubt write it out! Incident forms can be found online in the *Insurance and Claims Manual*.

**How do I know who to send copies to?**
Anything sent to the Heritage Center should be copied to the RMT. Most items will be sent to CA, SD and RD.
What is a Judicial Review Board?
The purpose of the Judicial Review Board is to create a mechanism by which effective and efficient disciplinary action may be taken against brothers or pledges of the chapter in a timely fashion. This provision is not intended and shall not, at any time, circumvent any of the rights and privileges granted to the same by the Bylaws, the Constitution and Statutory Code or the Board of Directors Statement of Policy of Alpha Kappa Psi.

MISSION: The Judicial Review Board may review any action by, of, or between pledge(s), brother(s), and their guest(s) (for those actions they will be held accountable) which may be considered inappropriate behavior, detrimental to the reputation of Alpha Kappa Psi and this chapter, or endangers the continuous smooth operations of this chapter. The Judicial Review Board ensures that a complete and thorough investigation is conducted, establishing the validity of the charges, and, if valid, the guilt or innocence of the accused and establishing an equitable punishment in the case of the former.

The Judicial Review Board is a formal remedy for serious or severe grievances against members of Alpha Kappa Psi. Any personal or minor problems can usually be settled through more informal channels. The Judicial Review Board is also responsible for hearing appeals by members who have been fined for any reason. The Judicial Review Board is encouraged to contact the Fraternity Judiciary Committee with any questions or uncertainties.

The Judicial Review Board should not need to be utilized more than a few times an academic term. If the Judicial Review Board is being utilized too frequently this is an indication of deeper problems within the chapter and the Judiciary Committee should be consulted.

Anytime the Judicial Review Board conducts an investigation it is to fill out an Investigation Report Form found online and submit it to the Judiciary Committee. Anytime an investigation is due to an alleged violation of a risk management policy (hazing, alcohol or sexual harassment) the chapter must forward this information onto the Judiciary Committee for final review and ruling.

For more information on Judicial Review Boards, see the Judiciary Committee Operations Manual found online at www.akpsi.org.

Where can I go to get additional education?
Additional education is available through webinars and eLearnings on www.akpsi.org. They offer an opportunity to supplement your programming schedule with topics that are more difficult to find locally. The webinar schedule and topics change each academic year. For the most current schedule and to register go to https://www.akpsi.org/webinars.

All webinars are recorded and placed in the webinar library which you can access at any time here. Simply go to www.akpis.org/webrecordings to find a topic!

All eLearning programs can be found here: www.akpsi.org/elearning.
Here are some common words and abbreviations used in Alpha Kappa Psi:

- **ACR**: Annual Chapter Report: chapter operations reporting tool
- **AVP**: Area Vice President: Leads an Area of AKPsi
- **BOD**: Board of Directors: group within fraternity responsible for setting policy and fraternity direction
- **BoDSOp**: Board of Directors Statement of Policy
- **CA**: Chapter advisor: An alumnus member who guides a chapter
- **CAB**: Chapter Advisory Board; smaller time commitment positions in specialty areas (recruitment, finance, etc.), under the direction of a chapter advisor and assist one specific chapter
- **CoL**: College of Leadership: held jointly with Convention
- **EVP**: Executive Vice President: assists the president
- **FA**: Faculty advisor: faculty member that guides a chapter
- **HC**: Heritage Center: central office for the fraternity, foundation and paid staff members
- **Induction**: Ceremony to become a pledge
- **Initiation**: Ceremony to become a brother
- **JC**: Judiciary Committee: reviews issues as related to the risk management policies on behalf of the fraternity
- **JRB**: Judicial Review Board: reviews membership issues within a chapter as pertains to rules and regulations
- **MT – Management Team**: consists of the president, executive vice president and 13 regional directors
- **OT**: Officer Training
- **PBLI**: Principled Business Leadership Institute
- **PEP**: Pledge Education Program: The only approved pledge program of the fraternity
- **RD**: Regional Director: oversees the chapters and volunteers within their region
- **RMT**: Regional Management Team: consists of CAs, FAs, SDs, regional managers and RD
- **RTB — Road to Brotherhood**: comprehensive membership program following the lifecycle of a brother from recruit to alumni
- **SD**: Section Director: oversees chapters within a portion of a region
- **YRS**: Yellow Rose Society: student giving program sponsored by the Alpha Kappa Psi Foundation
If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.

John Quincy Adams
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The Alpha Kappa Psi Vision, Core Values and Guiding Principles should be the foundation for any chapter activity. As an officer it is important to educate other members about their significance. Let these guide you and be the foundation of decisions and discussions.

**Vision**

Alpha Kappa Psi is recognized as the premier developer of principled business leaders.

**Core Values**

**Brotherhood** | Trust, respect, cooperation, companionship and aid to brothers is the expected norm  
**Knowledge** | Education and experience is emphasized and shared  
**Integrity** | All actions, whether in business or in life, are guided by honesty, ethics and fairness  
**Service** | Sharing of time, talent and treasure with society and our fraternity is a priority  
**Unity** | A common understanding of our vision and values that transcends chapter, generation and profession is utilized to anticipate and create the future

**Tagline**

Alpha Kappa Psi — Shaping People, Shaping Business

**Guiding Principles**

**Building Brotherhood** | The esoteric quality we call "Brotherhood" is of vital importance though difficult to define. Our members, from the day they become brothers until the end of their lives, foster a great love of the fraternity and a fondness for brother members. While brotherhood manifests itself in a multitude of ways, at its center is a sense of duty and respect for both the fraternity and individual members. All activities and decisions that involve the fraternity are guided by a sense of stewardship and selflessness. Members are anchored by the need to do what is in the best interest of the fraternity as a whole and are not swayed by individual self-interest.

**Lifelong Learning** | College is merely the beginning of business education. Our members share their knowledge and experiences openly with the people they work with, regardless of rank or position. In addition, they seek out opportunities to share their real-world experience with brother members, and in doing so they enhance the lifelong learning of those members.

**High Ethical Standards** | While the business world offers many opportunities for success and advancement, it also requires us to make decisions about how we succeed. Our members understand the importance of making decisions and conducting business in a way that takes into account both legal and ethical considerations. Our members serve as role models through their consistently fair and ethical conduct.

**Improving Communities** | Much is expected of those to whom much is given. Business professionals who seek to improve the communities in which they do business improve lives and develop goodwill. Our members actively give back to their communities through volunteer activities and monetary support.

**Enhancing the Fraternity for Life** | College chapters serve as living laboratories for classroom concepts and professional conduct. In turn, lessons learned in the fraternity prepare members for success in the business world. Because they recognize the value and importance of our Fraternity, our members are united in their
passion to build a legacy for the future. They support the fraternity through volunteer leadership and monetary gifts.

**Heritage Center Staff**

**Alpha Kappa Psi | 7801 E 88th Street :: Indianapolis, IN 46256-1233**
Phone Number: (317) 872-1553 :: Fax Number: (317) 872-1567
[www.akpsi.org/staff](http://www.akpsi.org/staff)

**Where do I get help?** Always start with the [www.akpsi.org](http://www.akpsi.org) website. Several standard questions can be found there. If the question needs to be elevated to the next level, check with your chapter advisor, section director or regional director. If they are unable to help, they will direct you properly.

**Chief Executive Officer | Steve Hartman, CAE**
*Ext 101*
Contact [Steve](mailto:Steve) at about:
- Operations, Fraternity & Foundation
- Staff Concerns
- Strategic Planning

**Managing Director of Alumni Services and Chief Operating Officer, Alpha Kappa Psi Foundation | Jess C. LaNore, CAE, Purdue ’00-Honorary/Life**
*Ext 109*
Contact [Jess](mailto:Jess) about:
- Academic Team
- Foundation Contributions
- Licensing/Trademarks
- Major Giving
- Merchandising Programs
- Planned Giving
- Scholarships
- The Diary

**Managing Director of Operations | Brian D. Parker, CAE, Indiana ’93-Life**
*Ext 105*
Contact [Brian](mailto:Brian) about:
- Expense Reimbursement
- Financial Statements, Fraternity & Foundation
- Liability Insurance
- MAPP
- Risk Management

**Managing Director of Student Services | Jessica R. Seitz, CAE, Auburn ’02-Honorary/Life**
*Ext 103*
Contact [Jessica](mailto:Jessica) about:
- Academy
- Case Competition
- Certified Fraternity Volunteer (CFV)
- Chapter Advisory Board (CAB)
- Convention
- Meeting Planning
- PBLI
- Volunteer Services
**Director of Communication | Jennifer L. Adamany, San Diego ’05-Life**
*Ext 106*
Contact **Jennifer** about:
- Branding
- Communication Technology
- Marketing
- Media Relations
- Publications
- Website

**Director of Communication and Information Services | Christopher W Pye, Shippensburg ’04-Life**
*Ext 119*
Contact **Chris** about:
- Career Center (online)
- Marketing
- Project Reconnect
- Surveys (online)
- Technology
- Website

**Director of Alumni Development | Jeffery D. Hughes, South Florida ’00-Life**
*Ext 108*
Contact **Jeff** about:
- Affinity/Royalty
- Alumni Association
- Alumni Awards
- Alumni Chapter Information
- Alumni Development
- Alumni Chapter Expansion
- Alumni Listings
- Chairman’s Advisory Council
- Life Loyal Program

**Director of Education | Jason R. Pierce**
*Ext 102*
Contact **Jason** about:
- College of Leadership
- Educational Programming
- eLearning
- Event Speakers
- Officer Training
- Pledge Education Program
- RMT Training
- Road to Brotherhood
- Webinars

**Administrative Assistance for Chapter Services | Melinda Rosenthall**
*Ext 116*
Contact **Melinda** about:
- Annual Chapter Report
- Chapter Services
- Community Service
- Dean’s Council
- Recruitment
- Show Cause
- Student Awards
- Student Chapter Expansion
Chapter Educational Resource Coordinators

- Area 1: Evie Eddins, Florida State '13 *(Ext 117)*
- Area 2: Cady E. Tabeling, Southern Indiana '11-Life *(Ext 113)*
- Area 3: Kortney Petry, Ball State '11 *(Ext 117)*
- Area 4: Liz Vickers, Stetson University '11 *(Ext 114)*

- Annual Chapter Report Performance
- Chapter Event Planning
- Chapter Health Plans
- Membership and Officer Reporting
- Membership Concerns

- Recruitment
- Retention
- Risk Management Probation
- Show Cause Probation

Member Service Representatives
The Member Service Representatives are the "Voices of the Heritage Center." They are the customer service representatives who handle many day-to-day activities at the Heritage Center. The Member Service Reps can answer many of the general requests you may have.

Member Services | Debby Orff
*Ext 110*
Contact Debby about:
- Address changes
- Charters
- E-Mail Addresses
- Initiate Certificates
- Member Processing

AKPsi Marketplace/Foundation | Hazel Collier
*Ext 111*
Contact Hazel about:
- Address changes
- Jewelry Orders
- Merchandise Orders
- Officer Updates

Finances and Collections | Cathy Cole
*Ext 112*
Contact Cathy about:
- Address changes
- Chapter Account Information
- Chapter Collection Problems
- Invoice and Statement Processing

Administrative Assistance/Event Registration Services | Judy Pawlus
*Ext 104*
Contact Judy about:
- Address changes
- Event registrations
- Scholarship applications
Volunteer Fraternity Leadership

Fraternity Board of Directors (BOD)
The fraternity’s board of directors is composed of nine alumni members elected by the Chapter Congress for terms of three years. The board in turn elects its officers who are the chairman, vice chairman, treasurer and secretary. The responsibility of the board of directors is to set policies and procedures that will guide the fraternity into the future. It acts as the supreme governing body of the fraternity between meetings of the Chapter Congress. It is charged with approving the fraternity budget, setting annual goals of the fraternity, overseeing the performance of the CEO and, most importantly, strategic planning. In strategic planning, the board takes input from members through a variety of sources and determines the fraternity’s core values, its vision for the future, or in laymen terms — what does Alpha Kappa Psi want to be known for? Further, it is charged with the responsibility of measuring how programs assist chapters and members to reach the vision. The board is the “big picture” strategic thinker of the organization much like the board of a corporation. The chairman of the board is the highest ranking volunteer in the fraternity.

Management Team (MT)
The Management Team is the volunteer operational arm of the organization. It is composed of the fraternity president, executive vice president, four area vice presidents and 16 regional directors. The Management Team is charged with the responsibility of servicing the chapters of the fraternity within the guidelines of policies and procedures set forth by the board of directors. The Management Team also manages a vast number of fraternity alumni volunteers, such as regional managers, section directors, chapter advisors, and chapter advisory board. The fraternity president serves as the chairman of the Management Team, presides over meetings of the Chapter Congress and appoints operational committees. For a current list of officers and regional directors visit www.akpsi.org/mt.

- **The President and Executive Vice President** administer the important work of appointing, charging and monitoring committees; overseeing implementation of budgets, resource materials, and educational programs approved by the Board of Directors. The president may appoint a cabinet of volunteers for assistance (as approved by the Board of Directors).
- **The Area Vice President** is tasked with the administrative oversight of specific Regions/Regional Directors and for executing the tactical direction of Fraternity operations based on strategic guidance from the Board of Directors (BOD) while partnering with the Fraternity Staff.
- **The Regional Directors** are responsible for leading and supervising their regions. They appoint regional management team members, run their regional officer training, attend conventions, and do other things that make the regional director position the undisputed toughest volunteer position in the fraternity.

Foundation Board of Directors
The Alpha Kappa Psi Foundation, founded in 1951, is a not-for-profit 501(c)(3) organization dedicated to promoting the ideals of AKPsi. Its mission is: providing resources for enhancing the educational experience of future business leaders. The governing body of the foundation is its board of directors. It is charged with the responsibility of setting polices, fundraising goals and plans, an operational budget, and the overall vision of the foundation. A professional staff oversees day-to-day activities. The foundation funds the Academy, All-AKPsi Academic Team, Case Competition award scholarships and numerous scholarships. So the fraternity can have quality speakers at its events (such as the Principled Business Leadership Institute or the College of Leadership), the foundation also underwrites expenses for many speakers through its Principled Business Leadership Fund.
**Foundation Scholarships**

**Academy, Late June (all expenses paid):**
The Academy is like no other Alpha Kappa Psi educational experience. It is an intimate, hands-on, challenging leadership development retreat. It is a unique program designed especially for those who demonstrate exceptional qualities for future business leaders. A limited registration cap and a remote location ensure that the experience is highly interactive. Through the generous support of Alpha Kappa Psi alumni, friends and Corporate America, the AKPsi Foundation pays all expenses for those attending the four-day experience.

Application deadline: Spring

**All-AKPsi Academic Team:**
The All-AKPsi Academic Team recognizes students who maintain excellence in academic standing while making positive contributions to their campus and community. The selection process measures an applicant’s ability to balance the pursuit of a degree with the development of leadership skills, interactive extracurricular participation, and a sense of social responsibility. From among the team members, one or more outstanding individuals receive the Top Scholar Award and are recognized with educational grants.

Application deadline: Fall

**Scholarships:**
There are more than 30 scholarships available to Alpha Kappa Psi members. Some of these scholarships may have certain requirements. Visit akpsi.org for a current listing of chapter and Fraternity-wide scholarships.

**Case Competition:**
Through the foundation’s Case Competition, students are introduced to the realities of decision making – including incomplete information, time constraints and conflicting goals – giving them first-hand experience in analyzing business situations. The competition was designed to stimulate students’ thinking by challenging their capabilities and preparing them for future managerial decision making.

**Leadership**

Leadership defined: Leadership is the art of mobilizing others to want to struggle for shared aspirations.
– The Student Leadership Challenge by Jim Kouzes and Barry Posner

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“I learned that a great leader is a man who has the ability to get other people to do what they don’t want to do and like it.” -Harry Truman
**Characteristics of a Leader**

Are you a leader? Here is a brief list of leadership characteristics:

- Leaders are good teachers and great communicators.
- Leaders have stamina.
- Leaders do what they know is right, rather than what is popular.
- Leaders are good at managing time.
- Leaders do not condone incompetence, they replace it.
- Leaders are reliable and open-minded.
- Leaders are good listeners.
- Leaders act with integrity.
- Leaders inspire a vision.

- Leaders are trustworthy and able to trust others.
- Leaders subordinate their egos to the goals of the chapter.
- Leaders know how to run meetings.
- Leaders teach all members the basics of chapter operations.
- Leaders help establish realistic goals and set action plans for reaching these goals.
- Leaders successfully motivate members on the importance of reaching goals.
- Leaders recruit competent people.

---

**Spotting Leadership Potential**

1. Future leaders show initiative and can resolve issues with minimal supervision instead of waiting around for constant direction.
2. Future leaders trust their own judgment and get on with the task at hand, taking responsibility and without fear of making mistakes.
3. Future leaders are thirsty for knowledge and seek mentors and role models as they understand there is much to learn.
4. Future leaders share their knowledge, recognizing that the more they give the more they receive in return. Knowledge hoarders do not make good leaders.
5. Future leaders accept they are not perfect and do not know everything, that they have limitations and do not know and cannot do it all. They are not afraid to show weakness.
6. Future leaders accept responsibility for their own mistakes. Taking ownership and taking risks increases the chance of error. Leaders admit, learn and move on without making excuses.
7. Future leaders take responsibility and don’t single people out or shift blame. Whilst any error is still acknowledged, it is ‘ours’ not the fault of an individual.
8. Future leaders inspire and bring out the best in others as their passion and drive are contagious and set the standard for others to aspire to.

Anyone who exhibits more than half of the traits listed above could be one of your emerging leaders and offered the training and development they need to maximize their capabilities.


*“It’s a fine thing to have ability, but the ability to discover ability in others is the true test.”*  
- Elbert Hubbard
Life Management

Student leaders are not only organization leaders but also students, spouses and friends. In short, there is more to student leaders' lives than the organizations they lead. A key to balancing all the different roles student leaders must take on requires effective use of their time. The following are some brief hints on how to make the most of your time and some suggested personal characteristics of good time managers.

- **List your goals** | Start with long-term goals and then narrow down your short-term goals. Set your priorities, not only for your goals but the roles you must fulfill.
- **Make a daily “to do” list** | Set your priorities every day. This keeps you on track with your short-term and long-term goals.
  - **Start with the “A’s”** | Categorize your list into A, B and C groups, with A being the most important. Then take the items in the B group and redistribute them to the A and C groups. This way you end up with a list of only high and low priorities. However, be careful to not ignore C items; if they are forgotten about they can turn into urgent A priorities.
- **Always ask yourself …** | “What is the best use of my time right now?” Do this whenever you have a free moment.
- **Handle each item just once** | If you pick up a piece of mail or receive a note, handle it then and there. Do not set it down before you resolve it, even if that means making a note to yourself to handle it later.
- **Do it NOW** | Do not procrastinate. Remember every big project is just a lot of little projects put together. Take each element one at a time.
- **Delegate** | Give tasks to other people so they can help.

Motivation

How can one promote a higher level of intensity within the chapter? It’s EASY; just follow these 5-steps:

1. **Strive to create a strong sense of belonging for everyone involved in the group; the members should feel as if they are honestly needed for whom they are.**
2. **Foster discussion with the group to set clear and precise goals/objectives for the chapter and ensure progress is communicated and celebrated.**
3. **Establish a definition of what is expected of each brother so they realize the expectations others have of them.**
4. **Assign responsibilities challenging others within a range of abilities and interest. These should be responsibilities which contribute to reaching the goals/objectives.**
5. **Observe the progress of the chapter toward completing the goals/objectives.**

When motivating others, remember and understand their personal values may be different than yours. What makes sense to you may not make sense to them. By trying to see something from another person’s point of view and empowering brothers to do what they are passionate about will help the brother and the chapter grow.
**SMART Goals**

**Specific** - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:
- **Who**: Who is involved?
- **What**: What do I want to accomplish?
- **Where**: Identify a location.
- **When**: Establish a time frame.
- **Which**: Identify requirements and constraints.
- **Why**: Specific reasons, purpose or benefits of accomplishing the goal.
**EXAMPLE**: A general goal would be, "Get in shape." But a specific goal would say, "Join a health club and workout 3 days a week."

**Measurable** - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as......How much? How many? How will I know when it is accomplished?

**Attainable** - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals. You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

**Realistic** - To be realistic, a goal must represent an objective toward which you are both willing and able to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love. Your goal is probably realistic if you truly believe that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

**Timely** - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.
The following action items will ensure your term starts off on the right foot. As a chapter officer, it is important that you are familiar with all the resources available to you and the chapter. These resources include materials produced by the Fraternity and local resources (volunteers, alumni) near your chapter. The key to a successful chapter is recognizing how much you can do and when to ask for help. There are thousands of alumni and volunteers who have been in your shoes and are willing to help. Use their experiences to enhance yours!

**Action Items:**
- Read this officer manual. You must know your duties and those of your fellow officers.
- Study the chapter Bylaws.
- Review the *Board of Directors’ Statement of Policy*. Pay special attention to the Risk Management policies. All of these are essential to a healthy chapter and are each officer’s responsibility.
- Review the *Constitution* and *Statutory Code*.
- Become familiar with *Robert’s Rules of Order*.
- Review the *Ritual of Alpha Kappa Psi* (version 8 or higher).
- Know the fraternity’s vision, core values and guiding principles.
- Log-in to [www.akpsi.org](http://www.akpsi.org) to set-up a profile and become familiar with how to use the chapter reporting tools.
- Read the *Road to Brotherhood*; being familiar with it will be essential in order to properly use it as a reference tool.
- Review the *Annual Chapter Report (ACR)*. The ACR allows you to work together with the chapter advisor and Fraternity to track key components of the chapter. The ACR will help you pass on historical information and chapter data to future members, as well as set short and long-term goals.
- Contact the chapter and faculty advisors to set up personal meetings.
- Set a time for weekly executive board meetings.
- Notify the Heritage Center staff, chapter advisor and regional director of any change in officer names for communication purposes. Ensure the chapter’s mailing address is current.
- Become familiar with the resources found at [www.akpsi.org](http://www.akpsi.org).
- Understand the fraternity organizational structure so you can direct your questions to the correct place.
- Have an emergency contact plan so you can contact chapter members in case of emergencies.
- Be professional – you are the role model for the chapter’s behavior.

**General Liability Insurance**

**I. INTRODUCTION**

The purpose of this manual is to give you an understanding of insurance coverage provided and information to properly report all actual and potential liability and property claims with which you may become involved. A certificate of insurance showing proof of coverage is provided with this manual. The final responsibility for the success of the insurance program rests with our fraternity and chapter. It is always important to remember that our first line of defense in liability matters is loss prevention, next is loss control, and the insurance contract is the final line of defense. The undergraduate and alumni members’ willingness to understand and assume the responsibility of sound risk management practices is a cornerstone of our program. In the event that an incident or claim does arise, the Alpha Kappa Psi Fraternity Heritage Center and Willis Insurance, will oversee the effective handling of all incident and claim investigation. An incident reporting form that must be completed and submitted at the time of any incident that results in bodily injury or property damage can be found at [www.akpsi.org](http://www.akpsi.org) in addition to a full insurance and claims manual.
II. LAWSUITS
There will be occasions when lawsuits may be served on a member of your chapter. As there is only a limited
time to answer a lawsuit, the following procedure applies:

a) Treat any potential, actual claim or lawsuit as a high priority item.

b) Utilizing the incident reporting form, note all relevant information.

c) Forward the suit and incident report by U.S. Postal Service Express Mail to the Alpha Kappa Psi Fraternity, Heritage Center, Attn.: Brian Parker, Managing Director of Operations.

III. GENERAL LIABILITY CLAIMS
The types of General Liability claims can be numerous and usually arise out of conditions of a chapter’s
premises. They more than likely involve injury or damage to someone other than an employee or an officer of
the fraternity. While on the scene, if possible, get all names, addresses and phone numbers of all parties
involved, as well as any witnesses to the accident. Immediately complete the incident reporting form and submit.

IV. WHAT SHOULD BE REPORTED?
Bodily injury to anyone other than an employee and any property damage for which there is a possibility that a
claim may be made against Alpha Kappa Psi Fraternity. Be sure to fully complete the enclosed incident
reporting form that will provide the needed information regarding the claim. It is imperative that all losses or
incidents be reported immediately to the Alpha Kappa Psi Heritage Center (See phone numbers and address
on below). The Alpha Kappa Psi Fraternity Heritage Center is responsible for providing the initial report of the
claim to HRH/Kirklin & Co, Inc. Once the claim report is sent to HRH/Kirklin & Co, Inc. you will likely be
contacted directly by HRH/Kirklin & Co, Inc. to discuss the incident. If you are unable to obtain necessary
details when first notified of any incident, still report any known facts.

V. INCIDENT/CLAIM REPORTING

| ATTN: Brian Parker | ATTN: Mick McGill |
| Managing Director of Operations | Vice President, Client Advocacy |
| 7801 E. 88th Street | 10707 Pacific Street, Suite 200 |
| Indianapolis, IN 46256-1233 | Omaha, NE 68114 |
| (317) 872-1553 – Phone | (402) 898-4199 – Phone |
| (317) 872-1567 – Facsimile | mmcgill@willis.com |

VI. GENERAL LIABILITY INSURANCE PROGRAM
The following description is a summary only and is not intended to serve as a substitute for the actual
insurance contract. The Alpha Kappa Psi Fraternity insurance program provides Blanket Public General Liability
Coverage of $1,000,000 per occurrence with a $2,000,000 general aggregate for all participating chapter and
chapter house organizations. (See the end of this section for explanation of types of coverage.) The coverage is
for bodily injury and property damage. This protects the local chapter, its officers and members, the house
corporation and the fraternity, including appointed volunteers, from claims arising out of bodily injury and
property damage occurring at the premises or at chapter functions away from the premises. It also protects
against claims arising out of libel, slander, false arrest, invasion of privacy, eviction from the premises,
consumption of food and beverages and incidental malpractice. It must be understood, however, that our
coverage is for general public liability. It is not accident insurance covering initiated and uninitiated members
for injuries sustained on the chapter premises and/or in chapter activities. Liability insurance is not a substitute
for medical insurance. Further, it is not Workers’ Compensation Insurance, which may be required for chapter
employees such as cooks and housemothers.

Insurer: Liberty Surplus Insurance Corporation
Policy Period: December 1, - November 30
Policy Numbers: DGLCH184369035
Adding Additional Insureds
Additional Insureds may be added to this policy. Such insureds may be your landlord, college, university and/or proprietor from whom the chapter may be renting property for a special event. Request for an additional insured endorsement should be made in writing at least three weeks in advance of any event and sent to Alpha Kappa Psi Fraternity Heritage Center, Attn.: Brian Parker, Managing Director of Operations, 7801 E. 88th Street, Indianapolis, IN 46256-1233. Phone (317) 872-1553, Fax (317) 872-1567. Upon approval of the request by the Alpha Kappa Psi Administrative Office and the insurance carrier Willis will issue a certificate of insurance with the original forwarded to the Additional Insured and a copy to the Heritage Center.

What Doesn’t Our Coverage Include?

i. Any claim of bodily injury and/or property damage from an incident resulting when:
   1) An illegal act was performed.
   2) An intentional act was performed.
   3) A contract made by the chapter is broken.
   4) There is any discharge, release or escape of smoke, vapors, soot, fume, acids, toxic chemicals, etc. upon land, the atmosphere of any water course or body of water.
   5) A chapter employee is hurt on the job. Each chapter with any employees must purchase Workers’ Compensation coverage locally.

ii. Any claim of property damage to property owned by, rented by, used by, or cared for by the chapter. An example, the chapter rents a portable generator for an outdoor function, and while it is in the care, custody and control of the chapter it is damaged and the lesser holds the chapter responsible and liable. No coverage is available under the Alpha Kappa Psi Fraternity liability insurance contract.

House Inspections
The insurance company has the right to make inspections and surveys at any time, give Willis Insurance and Alpha Kappa Psi Fraternity reports on the conditions that are found and recommend changes. Any inspections, surveys, reports or recommendations relate only to insurability and the premiums to be charged. Chapters and house corporations will be given advance notification of any inspections and copies of all reports.

Legal and Illegal Activity
Simply stated, no insurance policy in the world provides coverage for violations of the law. The Alpha Kappa Psi Fraternity insurance program is no exception to this rule. The key points to understand are:

- Compliance with federal, state, local and institutional (college or university) laws and regulations is required.
- Compliance with all regulations and policies of Alpha Kappa Psi Fraternity is required.

Those individuals who choose to violate these rules may void the protection for themselves under the Alpha Kappa Psi insurance program. Every effort has been made to avoid their actions from jeopardizing the other members, other entities, or other named insureds protected by the Alpha Kappa Psi program. The following brief examples are intended to provide illustration and do not represent legal advice.

i. With the broad awareness of its membership, the chapter serves alcohol to a minor in violation of the law at a chapter-sponsored function. In the event of an injury, claim or lawsuit, those persons found to be in violation of the law and/or Alpha Kappa Psi Policy (in this case the entire chapter) most likely would be without insurance protection. The other named insureds would be protected (i.e. the Fraternity, house corporation or alumni volunteers).

ii. Two of the members of a 65-man chapter cause injury to someone in connection with a hazing incident. This activity was unauthorized and done secretly without the knowledge of the chapter,
and strictly against chapter policy. In the event of an injury, claim or lawsuit, those persons (in this case, the two members) found to be in violation of the law and Alpha Kappa Psi Policy could be without insurance protection. The chapter, house corporation and other named insureds would be protected.

Great effort has been made to ensure coverage will be provided to those individuals and entities exposed to claims through no fault of their own. Chapters and chapter officers are protected from the unauthorized actions of individuals. The assets of house corporations are protected from the unauthorized actions of their chapters. Chapter Advisors are protected from the unauthorized actions of their individual chapter members and the chapter as a whole, as are the house corporations and all other appointed alumni volunteers involved with the Fraternity.

All questions regarding insurance interpretation and coverage should be directed to Willis Insurance. c/o Trude Smouse, 10707 Pacific Street, Suite 200, Omaha, NE 68114, Phone (800.736.4327, email smouset@willis.com.

**Hazing Policy**

Alpha Kappa Psi’s Hazing Policy can be found in the *Board of Director’s Statement of Policy* and online at [www.akpsi.org](http://www.akpsi.org). It shall be the responsibility of all members of Alpha Kappa Psi Fraternity to determine college, university or other legal jurisdiction policy regarding hazing, mental or physical, and to comply totally with such policies.

**Hazing Prevention**

When organizations are challenged to eliminate hazing practices, some members are often resistant to this change. In many cases, those who are most vocal against eliminating hazing are those who are upset about the hazing they themselves endured (but don’t admit this publicly) and expect others should be “abused” as well in order to gain “true” membership in the group just like they did.

Of course, if you try to eliminate hazing in your chapter, you will likely encounter many elaborate reasons for why this will be devastating for your group. While there will be some staunch supporters of the status quo, there will be many who can be convinced of the negative effects and potential risks of hazing. Believers in the supposed “benefits” of hazing may be more likely to change their opinion if they can envision some alternatives. The following are supposed benefits hazers believe they accomplish and some alternatives you can instill in your chapter that will accomplish the same goal:

- Foster unity:
  - Brother retreat.
  - Visit a ropes course to work on group cohesiveness, communication and leadership skills.
  - Non drinking socials to learn about each other.
- Develop problem-solving abilities:
  - Have discussions about chapter weaknesses such as poor recruitment, apathy and poor scholarship, and develop solutions the chapter might then adopt (i.e. create a business plan).
  - Do groups for rituals so they can work under a deadline.
- Teaches you to work under stress:
  - Prepare a challenging fundraiser and see it through to the end.
  - Have an interview workshop to prepare you better for tough interviews.
- Develop leadership skills:
  - Encourage participation in school/campus activities outside of the chapter.
  - Encourage new members to get involved in committees and/or leadership roles.
  - Develop a peer mentor program within your group for leadership roles.
- Invite school/community/business leaders into the chapter to share their experiences.
- Instill a sense of membership:
  - Start new traditions ~ it only takes a few academic terms for it to become a tradition.

**Believe it or not:**
Chapters found responsible of hazing have been required to eliminate hazing in order to stay open as a chapter of Alpha Kappa Psi. These chapters report that eliminating hazing increased member involvement therefore reducing apathy!

**Parliamentary Procedure**

**Basic Principle: Minority is heard but majority rules**

I. **Establish a quorum**
   A quorum is the number of people who must be present to take legal action on business matters and is essential to conducting business meetings. The quorum is stipulated in the bylaws, and before any business is discussed, the chair should establish for the record that a quorum exists.

II. **All members have equal rights**
    These include the right to make motions, debate, and vote. You need a two-thirds majority vote to deprive members of basic rights — such as closing or limiting debate and closing nominations. No member may be forced to vote, silence gives consent. General business — majority of those present

III. **Debate, decorum, and order**
    Only one main motion (one subject) may be considered at a time, and only one person may speak at a time. Anyone who wishes to make a motion should first be recognized by the chair and preface the motion with the words, “I move that.” If someone wishes to second the motion, that person does not have to wait to be recognized but merely calls out, “I second the motion.” Without a second motion, the chair moves on to the next agenda item. After the motion has been made and seconded, the chair restates the motion, which is termed a main motion. Discussion begins. To ensure order and that only one person speaks at a time, the chair recognizes members before they may speak. There must be an opportunity for at least one pro and one con for each motion and amendment. Technically, after a second is made, a motion cannot be withdrawn (not efficient to enforce).

IV. **Amendments**
    The purpose of an amendment is to change a motion already under consideration. If a member believes the right topic is being discussed but wants to modify the wording of the motion, he or she calls for an amendment. Technically, a motion may be amended, and the amendment to the motion may be amended, but no further amendments may be made. Amendments are motions, and as such, they require a second and full debate. Amendments can slightly change the main motion. Typically, if the author of the original motion agrees with the amendment it can be accepted as a “Friendly Amendment” and incorporated into the original motion without the need for debate or a vote.

V. **Closing Debate**
    A member who wishes to end debate may interrupt discussion and say “I move/call the previous question.” This motion requires a second and must receive a two-thirds majority vote. Should it receive a two-thirds majority, the chair then states, “The previous question has been called, all those in favor of the motion to...”

VI. **How to Run a Meeting**
    A. Decide how strict to be with parliamentary procedure — generally, the larger the group, the more strict you should be.
B. How will one be recognized to speak? — typically by raising your hand then being called upon by the chair. Large assemblies may have fixed microphones where lines are formed to speak.

C. Chair controls flow of meeting.
   i. Must appear unbiased, can never state an opinion on the motion before or during debate.
   ii. To be effective, must control flow of meeting by:
       iii. Quickly and decisively granting permission to speak.
       iv. Always watching that comments are being made at the appropriate times (a pro should be a pro, not a public service announcement; points of information should be questions not pros/cons). Always stop someone and ask him or her to explain his/her point if it sounds like the granted time is being appropriately used (if it sounds like someone is making a con during a point of information).
   v. Quickly and decisively making judgments on points of order.
   vi. Prompt for actions if meeting slows down (chair will entertain motion to ______ — such as close debate, open a window, consider “X”).
   vii. Don’t be afraid to take a recess if you need to clarify points or get some information.
   viii. Be quick to keep people in order (not speaking out of turn).
   ix. Don’t let debate get personal — name-calling is not allowed (try to get people to speak in the third person when referring to other people in the room and to address actions not people).

D. Use other resources — Warden, Parliamentarian, etc.

VII. Efficiency Tips
   A. Most motions can be voted on by acclamation (general consent).
   B. Use voice vote for motions. Chair’s ruling stands on results of voice vote unless “call for division” is called for, then vote count is needed.
   C. Chair cannot make motions but can offer to “entertain” a motion which may fix a particular sticking point in debate.
   D. If chair doesn’t know the answer to a “point of information,” he or she can call on someone else to answer it.

VIII. Potential Problems
   A. Noisy individual — warning from chair then warden removes.
   B. Bad environment (hot, cold) — chair can recess meeting to try remedy the situation.
   C. People speaking without being recognized — reminder from chair to wait to be recognized, if doesn’t work, warning from chair then warden removes.
   D. Debate lasting too long — “without objection, chair ends debate after two or more pro/cons.” (Two of the same back-to-back.)
   E. Meeting lasting too long — “without objection, chair rearranges agenda and will postpone consideration of certain items until next meeting.”
   F. Everyone wants to speak — in the order they raise their hands, a list is made, chair simply calls names off this list.

“Entrepreneur Larry Wilson defined the difference between passion and drive as the difference between expressing yourself and proving yourself.” — On Becoming a Leader By Warren G. Bennis
Parliamentary Procedure at a Glance

<table>
<thead>
<tr>
<th>To Do This:</th>
<th>You Say This:</th>
<th>May you interrupt the speaker?</th>
<th>Do you need a second?</th>
<th>Is it debatable?</th>
<th>Can it be amended?</th>
<th>What vote is needed?</th>
<th>Can it be reconsidered?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADJOURN MEETING</td>
<td>“I move that we adjourn”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>CALL AN INTERMISSION</td>
<td>“I move that we recess for...”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>COMPLAIN ABOUT HEAT, NOISE ETC.</td>
<td>“I rise to a question of privilege”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No (usually)</td>
</tr>
<tr>
<td>TEMPORARILY SUSPEND CONSIDERATION OF AN ISSUE</td>
<td>“I move to table the motion”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>I CALL QUESTION END DEBATE AND AMENDMENTS</td>
<td>“I move the previous question”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>POSTPONE DISCUSSION FOR A CERTAIN TIME</td>
<td>“I move to postpone the discussion until...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>GIVE CLOSER STUDY OF SOMETHING</td>
<td>“I move to refer the matter to committee”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>AMEND MOTION</td>
<td>“I move to amend the motion by...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>INTRODUCE BUSINESS</td>
<td>“I move that...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
</tbody>
</table>

The motions listed above are in order of precedence... Below there is no order...

| PROTEST BREACH OF RULES OF CONDUCT   | “I rise to a point of order.”                                          | Yes                             | No                    | No               | No                  | No Vote              | No                     |
| VOTE ON A RULING OF THE CHAIR       | “I appeal from the chair’s decision”                                  | Yes                             | Yes                   | Yes              | No                  | Majority             | Yes                    |
| SUSPEND RULES TEMPORARILY           | “I move to suspend the rules so that...”                               | No                              | Yes                   | No               | No                  | 2/3                  | No                     |
| AVOID CONSIDERING AN IMPROPER MATTER | “I object to consideration of this motion”                             | Yes                             | No                    | No               | No                  | 2/3                  | No                     |
| VERIFY A VOICE VOTE BY HAVING MEMBERS STAND | “I call for a division” or “Division!”                                | Yes                             | No                    | No               | No                  | No Vote              | No                     |
| REQUEST INFORMATION                 | “Point of information.”                                               | Yes                             | No                    | No               | No                  | No Vote              | No                     |
| TAKE UP A MATTER PREVIOUSLY TABLED   | “I move to take from the table...”                                     | No                              | Yes                   | No               | No                  | Majority             | No                     |
| RECONSIDER A HASTY ACTION           | “I move to reconsider the vote on...”                                 | Yes                             | Yes                   | Yes              | No                  | Majority             | No                     |

Notes:

1. Unless vote on question is not yet taken.
2. Unless the committee has already taken up the subject.
3. Only if the motion to be amended is.
4. Except in doubtful cases.
5. A majority vote in negative need to revisit ruling of chair.
6. A 2/3 vote in negative needed to prevent consideration of main motion.
7. Only if the main question or motion was not in fact considered.
8. Only if motion to be reconsidered is debatable.
Building alumni relations is vital in taking your chapter to the next level. Your chapter and area alumni make up the core of your fraternity professional network and can be a great benefit of joining our fraternity.

**Responsibilities**

- Maintain contact between chapter and area alumni at least once a year
- Assist in creating avenues for alumni to connect with current students
- Alumni database maintenance
  - The single most important foundation to building proper alumni relations. Without good contact information how can you build an alumni base?
  - Best resource: institution alumni office – it has the money, resources and time to track your alumni, it’s also their mission.
  - Other ideas: Alumni Six Degrees – use alumni to find alumni; Internet – less reliable, but a good way to confirm information; Phone-a-thons – personal contact and updated professional/living information.
- Alumni Event
  - Traditional/yearly events are the best way for alumni to re-connect at their leisure
  - Because the majority of our chapters DO NOT have houses, alumni must rely on knowing their chapter hosts an event at a specific time each year.
  - Couple the event with a large school event that brings in a large portion of alumni such as homecoming, commencement, etc. See if your alumni center will help you advertise or put together the event.
  - Make it easy on alumni – ‘flow-thru’ events allow alumni to re-connect for five minutes or five hours. It also allows the chapter to not have to put together intensive programs. Make it similar to a fun reception.
  - Plan ahead of time – Invitations should be in the mail no later than six weeks before the event. Start with a “save the date” and follow-up with the invitation and reminder. Remember, alumni have family, jobs and other commitments to balance.
  - Use the reunion planning guide at [https://www.akpsi.org/forms](https://www.akpsi.org/forms).
- Alumni Newsletter/Communication
  - Communicate with your alumni in a non-fundraising way at least once an academic year.
  - Inform your alumni of chapter achievements, news and initiatives – make them proud to have been a part of the chapter.
  - Again, keep it consistent (same point in the year, similar layout, etc.).
  - Use a mix of email (its free!) and paper copies (some don’t have emails).
  - Make sure this is something the most ambitious VP can be happy doing, and the least ambitious can implement.
  - Be creative in implementation. If you can, work with your college/school or alumni center to see if they’ll mail it or enclose it with their annual newsletter.
- Project Re-Connect
  - Annual project to find ‘lost’ alumni and double check those alumni who have addresses on file to ensure they are current.
  - Begins in October and runs through April 15 of each year.

**Keys to Success**

- Make alumni relations an integral part of the chapter, just as rituals, the ACR and recruitment are now to your chapter’s operations.
o Keep everything alumni see and do consistent from year to year.
  o Don’t ‘rebuild the wheel’ each time a new vice president is elected – work on enhancing the basic structure your chapter has established through better content and activities at those ‘traditional’ events.
  o Create ‘traditional’ events alumni can enjoy now, and five, ten or more years down the road.

o Build a relationship with the institution’s alumni association or alumni relations office – these are local experts who can help enhance your alumni relations program, as well as provide the necessary support to continue operations.

o Inform in advance – make sure alumni know the opportunities they have to help the chapter far out in advance: interviewers for Mid-Court and Court of Honor, guest speakers at new alumni orientation, etc.

o Combine communications to alumni – too much communication means events and announcements start to get deleted, ignored or tossed. Make the communication your chapter sends to alumni something they will want to make sure to read.
Frequently Asked Questions

What due dates do I need to know?
The most accurate and up-to-date due dates for your chapter are listed on www.akpsi.org. Check out the Calendar of Chapter Due Dates for the most up-to-date calendar planning.

When are the chapter minutes due?
Within seven days of your meetings. The Executive and Chapter Minutes are to be sent to the CA, SD and RD. All minutes should be sent to chapter members with 24 hours of the meeting.

What if the chapter roster is inaccurate?
Correct it immediately by logging into the chapter reporting tools at https://www.akpsi.org/cmt. Remember your dues and insurance billings are based on your roster.

Can first-year students pledge?
There is not a minimum GPA to pledge Alpha Kappa Psi, therefore freshman can pledge. Refer to the Statutory Code (Caput II Section 6) for more information.

Is there an inactive status?
No, circumstances such as internships, co-op, student abroad, military duty or medical/extreme hardship are considered for Leave of Absence status. Special exceptions have been made for those who are extremely ill, pregnant, etc., but approval is required by your RD. These members must be reported as Leave of Absence and they are to re-affiliate (and be reported as doing so) upon their return. There are NO “social memberships,” “senior status,” etc. Leave of Absence status is different than suspension due to attendance issues and/or financial delinquency.

How can a member be removed in good standing?
Only by leaving the university; this could be because they “drop out” of school, graduate with the degree in which they pledged (even if they stay on for grad school), transfer to another school or branch of your school (more than 50 miles).

Are there any circumstances when the brother must re-affiliate?
Yes, if the brother returns to the university at which their home chapter is located to complete the degree in which they pledged. (Examples of this would include conclusion of internships, co-op, and medical leave of absence.)

What are the different membership forms?
Chapter rosters can be updated online using the Chapter Management Tools at http://www.akpsi.org/cmt. Once you update your roster online, an e-mail is automatically sent to you confirming these changes have been requested. A second email will be sent once the changes are approved by the Heritage Center. Any officer currently reported to the Heritage Center can access the Chapter Management Tools.

- Report Pledges – Reporting of all new pledges. Information required: Full name, address, phone, e-mail address, date of birth, expected graduation year, induction date and expected initiation date. Download the Pledge Information Collection Form and have the pledges fill one out for easier input into the website. Due within seven business days of induction.
- Report Initiates - Reports your new brothers. Due within seven business days of initiation.
• **Chapter Roster Management** – Report status changes (graduating seniors, suspended brothers, leave of absence) and officer changes (incoming and outgoing officers; must be one of seven positions found in the *Constitution*; President, VP of Membership, VP of Admin, VP of Alumni Relations, Treasurer, Secretary, and MOR). A reason must be given for each suspension and Leave of Absence.

• **Member Reinstatement Form** – Reports brothers reinstated from temporary removal; also used to report affiliation of a brother who transfers from one university to another and joins the chapter.

**Can a brother resign from the fraternity?**
The membership of a member of the fraternity shall terminate upon the receipt of the member’s written resignation by the CEO of the fraternity or upon the member’s death. Any resignation does not relieve the member of any obligation incurred or commitments made before the resignation. (*Constitution, Article II, Section 8D*). Chapters cannot resign their members, members can only resign themselves.

A brother who resigns cannot attend any fraternity meetings, rituals or events and should not refer to his or her former membership or fraternity experiences in any document, such as résumés, employment applications, or job interviews.

**Can a chapter purchase alcohol?**
It cannot! See the risk management policies in the *Board of Directors Statement of Policy*.

**What is the chapter’s fiscal year?**
Per the *Constitution and Statutory Code* each chapter shall follow the fiscal year of April 1 – March 31. NO EXCEPTIONS.

**What is an audit and when should it be done?**
It is a review of all income and expenses and serves to ensure to the chapter, the outgoing treasurer and the incoming treasurer all funds have all been properly accounted for and any questions are resolved in a timely fashion. It should be done at the end of the treasurer’s term by the audit committee, should not include the treasurer and preferably will include at least one faculty/alumnus/CPA. A copy of the chapter audit is due to the Heritage Center by May 31 of each year after the conclusion of the chapter fiscal year (March 31). Chapters are encouraged to reference the *Chapter Audit Manual* for assistance.

**What are officer evaluations and when should they be done?**
Officer evaluations are an opportunity for the brothers to give the officers of the chapter feedback and constructive criticism on themselves in several categories. Some chapters do this once an academic term (after the first third of the term); others do it twice an academic term (at the 1/3 point and at the 2/3 point). It should be stressed that this is not personal and should be used as an anonymous way to help each officer grow and develop on a professional level. A sample officer evaluation can be found in the *Road to Brotherhood*.

**What is an incident report and when do I send one?**
An incident report is filled out whenever a negative event occurs, especially one which could result in legal issues, whether a lawsuit or police or judicial action. Examples are anytime the “authorities” (police, ambulance, univ. etc.) are involved. Even if you think it will “go away,” you should document it! Always consult with the RMT if there is even a question. When in doubt write it out! Incident forms can be found online in the *Insurance and Claims Manual*.

**How do I know who to send copies to?**
 Anything sent to the Heritage Center should be copied to the RMT. Most items will be sent to CA, SD and RD.
**What is a Judicial Review Board?**

The purpose of the Judicial Review Board is to create a mechanism by which effective and efficient disciplinary action may be taken against brothers or pledges of the chapter in a timely fashion. This provision is not intended and shall not, at any time, circumvent any of the rights and privileges granted to the same by the Bylaws, the *Constitution and Statutory Code* or the *Board of Directors Statement of Policy* of Alpha Kappa Psi.

**MISSION:** The Judicial Review Board may review any action by, of, or between pledge(s), brother(s), and their guest(s) (for those actions they will be held accountable) which may be considered inappropriate behavior, detrimental to the reputation of Alpha Kappa Psi and this chapter, or endangers the continuous smooth operations of this chapter. The Judicial Review Board ensures that a complete and thorough investigation is conducted, establishing the validity of the charges, and, if valid, the guilt or innocence of the accused and establishing an equitable punishment in the case of the former.

The Judicial Review Board is a formal remedy for serious or severe grievances against members of Alpha Kappa Psi. Any personal or minor problems can usually be settled through more informal channels. The Judicial Review Board is also responsible for hearing appeals by members who have been fined for any reason. The Judicial Review Board is encouraged to contact the Fraternity Judiciary Committee with any questions or uncertainties.

The Judicial Review Board should not need to be utilized more than a few times an academic term. If the Judicial Review Board is being utilized too frequently this is an indication of deeper problems within the chapter and the Judiciary Committee should be consulted.

Anytime the Judicial Review Board conducts an investigation it is to fill out an Investigation Report Form found online and submit it to the Judiciary Committee. Anytime an investigation is due to an alleged violation of a risk management policy (hazing, alcohol or sexual harassment) the chapter must forward this information onto the Judiciary Committee for final review and ruling.

For more information on Judicial Review Boards, see the *Judiciary Committee Operations Manual* found online at [www.akpsi.org](http://www.akpsi.org).

**Where can I go to get additional education?**

Additional education is available through webinars and eLearnings on [www.akpsi.org](http://www.akpsi.org). They offer an opportunity to supplement your programming schedule with topics that are more difficult to find locally. The webinar schedule and topics change each academic year. For the most current schedule and to register go to [https://www.akpsi.org/webinars](https://www.akpsi.org/webinars).

All webinars are recorded and placed in the webinar library which you can access at any time here. Simply go to [www.akpis.org/webrecordings](http://www.akpis.org/webrecordings) to find a topic!

All eLearning programs can be found here: [www.akpsi.org/elearning](http://www.akpsi.org/elearning).
Here are some common words and abbreviations used in Alpha Kappa Psi:

- **ACR**: Annual Chapter Report: chapter operations reporting tool
- **AVP**: Area Vice President: Leads an Area of AKPsi
- **BOD**: Board of Directors: group within fraternity responsible for setting policy and fraternity direction
- **BoDSoP**: Board of Directors Statement of Policy
- **CA**: Chapter advisor: An alumnus member who guides a chapter
- **CAB**: Chapter Advisory Board; smaller time commitment positions in specialty areas (recruitment, finance, etc.), under the direction of a chapter advisor and assist one specific chapter
- **CoL**: College of Leadership: held jointly with Convention
- **EVP**: Executive Vice President: assists the president
- **FA**: Faculty advisor: faculty member that guides a chapter
- **HC**: Heritage Center: central office for the fraternity, foundation and paid staff members
- **Induction**: Ceremony to become a pledge
- **Initiation**: Ceremony to become a brother
- **JC**: Judiciary Committee: reviews issues as related to the risk management policies on behalf of the fraternity
- **JRB**: Judicial Review Board: reviews membership issues within a chapter as pertains to rules and regulations
- **MT** – Management Team: consists of the president, executive vice president and 13 regional directors
- **OT**: Officer Training
- **PBLI**: Principled Business Leadership Institute
- **PEP**: Pledge Education Program: The only approved pledge program of the fraternity
- **RD**: Regional Director: oversees the chapters and volunteers within their region
- **RMT**: Regional Management Team: consists of CAs, FAs, SDs, regional managers and RD
- **RTB** — Road to Brotherhood: comprehensive membership program following the lifecycle of a brother from recruit to alumni
- **SD**: Section Director: oversees chapters within a portion of a region
- **YRS**: Yellow Rose Society: student giving program sponsored by the Alpha Kappa Psi Foundation
If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.

John Quincy Adams
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**Alpha Kappa Psi Vision, Core Values and Guiding Principles**
The Alpha Kappa Psi Vision, Core Values and Guiding Principles should be the foundation for any chapter activity. As an officer it is important to educate other members about their significance. Let these guide you and be the foundation of decisions and discussions.

**Vision**

Alpha Kappa Psi is recognized as the premier developer of principled business leaders.

**Core Values**

- **Brotherhood** | Trust, respect, cooperation, companionship and aid to brothers is the expected norm
- **Knowledge** | Education and experience is emphasized and shared
- **Integrity** | All actions, whether in business or in life, are guided by honesty, ethics and fairness
- **Service** | Sharing of time, talent and treasure with society and our fraternity is a priority
- **Unity** | A common understanding of our vision and values that transcends chapter, generation and profession is utilized to anticipate and create the future

**Tagline**

Alpha Kappa Psi — Shaping People, Shaping Business

**Guiding Principles**

- **Building Brotherhood** | The esoteric quality we call "Brotherhood" is of vital importance though difficult to define. Our members, from the day they become brothers until the end of their lives, foster a great love of the fraternity and a fondness for brother members. While brotherhood manifests itself in a multitude of ways, at its center is a sense of duty and respect for both the fraternity and individual members. All activities and decisions that involve the fraternity are guided by a sense of stewardship and selflessness. Members are anchored by the need to do what is in the best interest of the fraternity as a whole and are not swayed by individual self-interest.

- **Lifelong Learning** | College is merely the beginning of business education. Our members share their knowledge and experiences openly with the people they work with, regardless of rank or position. In addition, they seek out opportunities to share their real-world experience with brother members, and in doing so they enhance the lifelong learning of those members.

- **High Ethical Standards** | While the business world offers many opportunities for success and advancement, it also requires us to make decisions about how we succeed. Our members understand the importance of making decisions and conducting business in a way that takes into account both legal and ethical considerations. Our members serve as role models through their consistently fair and ethical conduct.

- **Improving Communities** | Much is expected of those to whom much is given. Business professionals who seek to improve the communities in which they do business improve lives and develop goodwill. Our members actively give back to their communities through volunteer activities and monetary support.

- **Enhancing the Fraternity for Life** | College chapters serve as living laboratories for classroom concepts and professional conduct. In turn, lessons learned in the fraternity prepare members for success in the business world. Because they recognize the value and importance of our Fraternity, our members are united in their passion to build a legacy for the future. They support the fraternity through volunteer leadership and monetary gifts.
Where do I get help? Always start with the [www.akpsi.org](http://www.akpsi.org) website. Several standard questions can be found there. If the question needs to be elevated to the next level, check with your chapter advisor, section director or regional director. If they are unable to help, they will direct you properly.

**Chief Executive Officer | Steve Hartman, CAE**
*Ext 101*
Contact **Steve** at about:
- Operations, Fraternity & Foundation
- Strategic Planning
- Staff Concerns

**Managing Director of Alumni Services and Chief Operating Officer, Alpha Kappa Psi Foundation | Jess C. LaNore, CAE, Purdue ’00-Honorary/Life**
*Ext 109*
Contact **Jess** about:
- Academic Team
- Foundation Contributions
- Licensing/Trademarks
- Major Giving
- Merchandising Programs
- Planned Giving
- Scholarships
- The Diary

**Managing Director of Operations | Brian D. Parker, CAE, Indiana ’93-Life**
*Ext 105*
Contact **Brian** about:
- Expense Reimbursement
- Financial Statements, Fraternity & Foundation
- Liability Insurance
- MAPP
- Risk Management

**Managing Director of Student Services | Jessica R. Seitz, CAE, Auburn ’02-Honorary/Life**
*Ext 103*
Contact **Jessica** about:
- Academy
- Case Competition
- Certified Fraternity Volunteer (CFV)
- Chapter Advisory Board (CAB)
- Convention
- Meeting Planning
- PBLI
- Volunteer Services

**Director of Communication | Jennifer L. Adamany, San Diego ’05-Life**
*Ext 106*
Contact **Jennifer** about:
- Branding
- Communication Technology
• Marketing  
• Media Relations  
• Publications  
• Website

**Director of Communication and Information Services | Christopher W Pye, Shippensburg ’04-Life**  
*Ext 119*  
Contact **Chris** about:  
• Career Center (online)  
• Marketing  
• Project Reconnect  
• Surveys (online)  
• Technology  
• Website

**Director of Alumni Development | Jeffery D. Hughes, South Florida ’00-Life**  
*Ext 108*  
Contact **Jeff** about:  
• Affinity/Royalty  
• Alumni Association  
• Alumni Awards  
• Alumni Chapter Information  
• Alumni Development  
• Alumni Chapter Expansion  
• Alumni Listings  
• Chairman’s Advisory Council  
• Life Loyal Program

**Director of Education | Jason R. Pierce**  
*Ext 102*  
Contact **Jason** about:  
• College of Leadership  
• Educational Programming  
• eLearning  
• Event Speakers  
• Officer Training  
• Pledge Education Program  
• RMT Training  
• Road to Brotherhood  
• Webinars

**Administrative Assistance for Chapter Services | Melinda Rosenthal**  
*Ext 116*  
Contact **Melinda** about:  
• Annual Chapter Report  
• Chapter Services  
• Community Service  
• Dean’s Council  
• Recruitment  
• Show Cause  
• Student Awards  
• Student Chapter Expansion

**Chapter Educational Resource Coordinators**  
• **Area 1:** Evie Eddins, Florida State ’13 *(Ext 117)*  
• **Area 2:** Cady E. Tabeling, Southern Indiana ’11-Life *(Ext 113)*  
• **Area 3:** Kortney Petry, Ball State ’11 *(Ext 117)*  
• **Area 4:** Liz Vickers, Stetson University ’11 *(Ext 114)*  
  • Annual Chapter Report Performance  
  • Chapter Event Planning  
  • Chapter Health Plans  
  • Membership and Officer Reporting  
  • Recruitment  
  • Retention  
  • Risk Management Probation  
  • Show Cause Probation  
  • Membership Concerns
Member Service Representatives
The Member Service Representatives are the "Voices of the Heritage Center." They are the customer service representatives who handle many day-to-day activities at the Heritage Center. The Member Service Reps can answer many of the general requests you may have.

Member Services | Debby Orff
Ext 110
Contact Debby about:
- Address changes
- Charters
- E-Mail Addresses
- Initiate Certificates
- Member Processing

AKPsi Marketplace/Foundation | Hazel Collier
Ext 111
Contact Hazel about:
- Address changes
- Jewelry Orders
- Merchandise Orders
- Officer Updates

Finances and Collections | Cathy Cole
Ext 112
Contact Cathy about:
- Address changes
- Chapter Account Information
- Chapter Collection Problems
- Invoice and Statement Processing

Administrative Assistance/Event Registration Services | Judy Pawlus
Ext 104
Contact Judy about:
- Address changes
- Event registrations
- Scholarship applications
Fraternity Board of Directors (BOD)
The fraternity’s board of directors is composed of nine alumni members elected by the Chapter Congress for terms of three years. The board in turn elects its officers who are the chairman, vice chairman, treasurer and secretary. The responsibility of the board of directors is to set policies and procedures that will guide the fraternity into the future. It acts as the supreme governing body of the fraternity between meetings of the Chapter Congress. It is charged with approving the fraternity budget, setting annual goals of the fraternity, overseeing the performance of the CEO and, most importantly, strategic planning. In strategic planning, the board takes input from members through a variety of sources and determines the fraternity’s core values, its vision for the future, or in laymen terms — what does Alpha Kappa Psi want to be known for? Further, it is charged with the responsibility of measuring how programs assist chapters and members to reach the vision. The board is the “big picture” strategic thinker of the organization much like the board of a corporation. The chairman of the board is the highest ranking volunteer in the fraternity.

Management Team (MT)
The Management Team is the volunteer operational arm of the organization. It is composed of the fraternity president, executive vice president, four area vice presidents and 16 regional directors. The Management Team is charged with the responsibility of servicing the chapters of the fraternity within the guidelines of policies and procedures set forth by the board of directors. The Management Team also manages a vast number of fraternity alumni volunteers, such as regional managers, section directors, chapter advisors, and chapter advisory board. The fraternity president serves as the chairman of the Management Team, presides over meetings of the Chapter Congress and appoints operational committees. For a current list of officers and regional directors visit www.akpsi.org/mt.

- **The President and Executive Vice President** administer the important work of appointing, charging and monitoring committees; overseeing implementation of budgets, resource materials, and educational programs approved by the Board of Directors. The president may appoint a cabinet of volunteers for assistance (as approved by the Board of Directors).
- **The Area Vice President** is tasked with the administrative oversight of specific Regions/Regional Directors and for executing the tactical direction of Fraternity operations based on strategic guidance from the Board of Directors (BOD) while partnering with the Fraternity Staff.
- **The Regional Directors** are responsible for leading and supervising their regions. They appoint regional management team members, run their regional officer training, attend conventions, and do other things that make the regional director position the undisputed toughest volunteer position in the fraternity.

Foundation Board of Directors
The Alpha Kappa Psi Foundation, founded in 1951, is a not-for-profit 501(c)(3) organization dedicated to promoting the ideals of AKPsi. Its mission is: providing resources for enhancing the educational experience of future business leaders. The governing body of the foundation is its board of directors. It is charged with the responsibility of setting polices, fundraising goals and plans, an operational budget, and the overall vision of the foundation. A professional staff oversees day-to-day activities. The foundation funds the Academy, All-AKPsi Academic Team, Case Competition award scholarships and numerous scholarships. So the fraternity can have quality speakers at its events (such as the Principled Business Leadership Institute or the College of Leadership), the foundation also underwrites expenses for many speakers through its Principled Business Leadership Fund.
Foundation Scholarships

Academy, Late June (all expenses paid):
The Academy is like no other Alpha Kappa Psi educational experience. It is an intimate, hands-on, challenging leadership development retreat. It is a unique program designed especially for those who demonstrate exceptional qualities for future business leaders. A limited registration cap and a remote location ensure that the experience is highly interactive. Through the generous support of Alpha Kappa Psi alumni, friends and Corporate America, the AKPsi Foundation pays all expenses for those attending the four-day experience.

Application deadline: Spring

All-AKPsi Academic Team:
The All-AKPsi Academic Team recognizes students who maintain excellence in academic standing while making positive contributions to their campus and community. The selection process measures an applicant's ability to balance the pursuit of a degree with the development of leadership skills, interactive extracurricular participation, and a sense of social responsibility. From among the team members, one or more outstanding individuals receive the Top Scholar Award and are recognized with educational grants.

Application deadline: Fall

Scholarships:
There are more than 30 scholarships available to Alpha Kappa Psi members. Some of these scholarships may have certain requirements. Visit akpsi.org for a current listing of chapter and Fraternity-wide scholarships.

Case Competition:
Through the foundation’s Case Competition, students are introduced to the realities of decision making – including incomplete information, time constraints and conflicting goals – giving them first-hand experience in analyzing business situations. The competition was designed to stimulate students’ thinking by challenging their capabilities and preparing them for future managerial decision making.

Leadership

Leadership defined: Leadership is the art of mobilizing others to want to struggle for shared aspirations.
– The Student Leadership Challenge by Jim Kouzes and Barry Posner

<table>
<thead>
<tr>
<th>What do we expect from leaders?</th>
<th>Why do we need leaders?</th>
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<tr>
<td>Direction</td>
<td>Efficiency</td>
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<tr>
<td>Knowledge</td>
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<td>Fairness</td>
<td>Promote consistency</td>
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<td>Respect for others</td>
<td>Promote teamwork</td>
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<td>Courage</td>
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<td>Consistency</td>
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<td>Understanding</td>
<td>Increase revenues</td>
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<td>Discipline</td>
<td>Control system</td>
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“"I learned that a great leader is a man who has the ability to get other people to do what they don’t want to do and like it.” -Harry Truman
Characteristics of a Leader
Are you a leader? Here is a brief list of leadership characteristics:

<table>
<thead>
<tr>
<th>Characteristics of a Leader</th>
<th>Spotting Leadership Potential*</th>
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<tbody>
<tr>
<td>• Leaders are good teachers and great communicators.</td>
<td>1. Future leaders show initiative and can resolve issues with minimal supervision instead of waiting around for constant direction.</td>
</tr>
<tr>
<td>• Leaders have stamina.</td>
<td>2. Future leaders trust their own judgment and get on with the task at hand, taking responsibility and without fear of making mistakes.</td>
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<tr>
<td>• Leaders do what they know is right, rather than what is popular.</td>
<td>3. Future leaders are thirsty for knowledge and seek mentors and role models as they understand there is much to learn.</td>
</tr>
<tr>
<td>• Leaders are good at managing time.</td>
<td>4. Future leaders share their knowledge, recognizing that the more they give the more they receive in return. Knowledge hoarders do not make good leaders.</td>
</tr>
<tr>
<td>• Leaders do not condone incompetence, they replace it.</td>
<td>5. Future leaders accept they are not perfect and do not know everything, that they have limitations and do not know and cannot do it all. They are not afraid to show weakness.</td>
</tr>
<tr>
<td>• Leaders are reliable and open-minded.</td>
<td>6. Future leaders accept responsibility for their own mistakes. Taking ownership and taking risks increases the chance of error. Leaders admit, learn and move on without making excuses.</td>
</tr>
<tr>
<td>• Leaders are good listeners.</td>
<td>7. Future leaders take responsibility and don’t single people out or shift blame. Whilst any error is still acknowledged, it is ‘ours’ not the fault of an individual.</td>
</tr>
<tr>
<td>• Leaders act with integrity.</td>
<td>8. Future leaders inspire and bring out the best in others as their passion and drive are contagious and set the standard for others to aspire to.</td>
</tr>
<tr>
<td>• Leaders inspire a vision.</td>
<td>Anyone who exhibits more than half of the traits listed above could be one of your emerging leaders and offered the training and development they need to maximize their capabilities.</td>
</tr>
</tbody>
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“It’s a fine thing to have ability, but the ability to discover ability in others is the true test.”

-Elbert Hubbard
Life Management
Student leaders are not only organization leaders but also students, spouses and friends. In short, there is more to student leaders' lives than the organizations they lead. A key to balancing all the different roles student leaders must take on requires effective use of their time. The following are some brief hints on how to make the most of your time and some suggested personal characteristics of good time managers.

- **List your goals** | Start with long-term goals and then narrow down your short-term goals. Set your priorities, not only for your goals but the roles you must fulfill.
- **Make a daily "to do" list** | Set your priorities every day. This keeps you on track with your short-term and long-term goals.
  - **Start with the "A's"** | Categorize your list into A, B and C groups, with A being the most important. Then take the items in the B group and redistribute them to the A and C groups. This way you end up with a list of only high and low priorities. However, be careful to not ignore C items; if they are forgotten about they can turn into urgent A priorities.
- **Always ask yourself ...** | “What is the best use of my time right now?” Do this whenever you have a free moment.
- **Handle each item just once** | If you pick up a piece of mail or receive a note, handle it then and there. Do not set it down before you resolve it, even if that means making a note to yourself to handle it later.
- **Do it NOW** | Do not procrastinate. Remember every big project is just a lot of little projects put together. Take each element one at a time.
- **Delegate** | Give tasks to other people so they can help.

Motivation
How can one promote a higher level of intensity within the chapter? It’s EASY; just follow these 5-steps:

1. **Strive to create a strong sense of belonging for everyone involved in the group; the members should feel as if they are honestly needed for whom they are.**
2. **Foster discussion with the group to set clear and precise goals/objectives for the chapter and ensure progress is communicated and celebrated.**
3. **Establish a definition of what is expected of each brother so they realize the expectations others have of them.**
4. **Assign responsibilities challenging others within a range of abilities and interest. These should be responsibilities which contribute to reaching the goals/objectives.**
5. **Observe the progress of the chapter toward completing the goals/objectives.**

When motivating others, remember and understand their personal values may be different than yours. What makes sense to you may not make sense to them. By trying to see something from another person’s point of view and empowering brothers to do what they are passionate about will help the brother and the chapter grow.
**SMART Goals**

**Specific** - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

*Who: Who is involved?*
*What: What do I want to accomplish?*
*Where: Identify a location.*
*When: Establish a time frame.*
*Which: Identify requirements and constraints.*
*Why: Specific reasons, purpose or benefits of accomplishing the goal.*

**EXAMPLE:** A general goal would be, "Get in shape." But a specific goal would say, "Join a health club and workout 3 days a week."

**Measurable** - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as......How much? How many? How will I know when it is accomplished?

**Attainable** - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals. You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them.

When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

**Realistic** - To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love. Your goal is probably realistic if you truly believe that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

**Timely** - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.
The following action items will ensure your term starts off on the right foot. As a chapter officer, it is important that you are familiar with all the resources available to you and the chapter. These resources include materials produced by the Fraternity and local resources (volunteers, alumni) near your chapter. The key to a successful chapter is recognizing how much you can do and when to ask for help. There are thousands of alumni and volunteers who have been in your shoes and are willing to help. Use their experiences to enhance yours!

Action Items:

- Read this officer manual. You must know your duties and those of your fellow officers.
- Study the chapter Bylaws.
- Review the *Board of Directors’ Statement of Policy*. Pay special attention to the Risk Management policies. All of these are essential to a healthy chapter and are each officer’s responsibility.
- Review the *Constitution and Statutory Code*.
- Become familiar with Robert’s *Rules of Order*.
- Review the *Ritual of Alpha Kappa Psi* (version 8 or higher).
- Know the fraternity’s vision, core values and guiding principles.
- Log-in to [www.akpsi.org](http://www.akpsi.org) to set-up a profile and become familiar with how to use the chapter reporting tools.
- Read the *Road to Brotherhood*; being familiar with it will be essential in order to properly use it as a reference tool.
- Review the *Annual Chapter Report (ACR)*. The ACR allows you to work together with the chapter advisor and Fraternity to track key components of the chapter. The ACR will help you pass on historical information and chapter data to future members, as well as set short and long-term goals.
- Contact the chapter and faculty advisors to set up personal meetings.
- Set a time for weekly executive board meetings.
- Notify the Heritage Center staff, chapter advisor and regional director of any change in officer names for communication purposes. Ensure the chapter's mailing address is current.
- Become familiar with the resources found at [www.akpsi.org](http://www.akpsi.org).
- Understand the fraternity organizational structure so you can direct your questions to the correct place.
- Have an emergency contact plan so you can contact chapter members in case of emergencies.
- Be professional – you are the role model for the chapter’s behavior.

**General Liability Insurance**

I. INTRODUCTION

The purpose of this manual is to give you an understanding of insurance coverage provided and information to properly report all actual and potential liability and property claims with which you may become involved. A certificate of insurance showing proof of coverage is provided with this manual. The final responsibility for the success of the insurance program rests with our fraternity and chapter. It is always important to remember that our first line of defense in liability matters is loss prevention, next is loss control, and the insurance contract is the final line of defense. The undergraduate and alumni members' willingness to understand and assume the responsibility of sound risk management practices is a cornerstone of our program. In the event that an incident or claim does arise, the Alpha Kappa Psi Fraternity Heritage Center and Willis Insurance, will oversee the effective handling of all incident and claim investigation. An incident reporting form that must be completed and submitted at the time of any incident that results in bodily injury or property damage can be found at www.akpsi.org in addition to a full insurance and claims manual.
II. LAWSUITS
There will be occasions when lawsuits may be served on a member of your chapter. As there is only a limited time to answer a lawsuit, the following procedure applies:
   a) Treat any potential, actual claim or lawsuit as a high priority item.
   b) Utilizing the incident reporting form, note all relevant information.
   c) Forward the suit and incident report by U.S. Postal Service Express Mail to the Alpha Kappa Psi Fraternity, Heritage Center, Attn.: Brian Parker, Managing Director of Operations.

III. GENERAL LIABILITY CLAIMS
The types of General Liability claims can be numerous and usually arise out of conditions of a chapter’s premises. They more than likely involve injury or damage to someone other than an employee or an officer of the fraternity. While on the scene, if possible, get all names, addresses and phone numbers of all parties involved, as well as any witnesses to the accident. Immediately complete the incident reporting form and submit.

IV. WHAT SHOULD BE REPORTED?
Bodily injury to anyone other than an employee and any property damage for which there is a possibility that a claim may be made against Alpha Kappa Psi Fraternity. Be sure to fully complete the enclosed incident reporting form that will provide the needed information regarding the claim. It is imperative that all losses or incidents be reported immediately to the Alpha Kappa Psi Heritage Center (See phone numbers and address on below). The Alpha Kappa Psi Fraternity Heritage Center is responsible for providing the initial report of the claim to HRH/Kirklin & Co, Inc. Once the claim report is sent to HRH/Kirklin & Co, Inc. you will likely be contacted directly by HRH/Kirklin & Co, Inc. to discuss the incident. If you are unable to obtain necessary details when first notified of any incident, still report any known facts.

V. INCIDENT/CLAIM REPORTING

| ATTN: Brian Parker |
| Managing Director of Operations |
| 7801 E. 88th Street |
| Indianapolis, IN 46256-1233 |
| (317) 872-1553 – Phone |
| (317) 872-1567 – Facsimile |

| ATTN: Mick McGill |
| Vice President, Client Advocacy |
| 10707 Pacific Street, Suite 200 |
| Omaha, NE 68114 |
| (402) 898-4199 – Phone |
| mmcgill@willis.com |

VI. GENERAL LIABILITY INSURANCE PROGRAM
The following description is a summary only and is not intended to serve as a substitute for the actual insurance contract. The Alpha Kappa Psi Fraternity insurance program provides Blanket Public General Liability Coverage of $1,000,000 per occurrence with a $2,000,000 general aggregate for all participating chapter and chapter house organizations. (See the end of this section for explanation of types of coverage.) The coverage is for bodily injury and property damage. This protects the local chapter, its officers and members, the house corporation and the fraternity, including appointed volunteers, from claims arising out of bodily injury and property damage occurring at the premises or at chapter functions away from the premises. It also protects against claims arising out of libel, slander, false arrest, invasion of privacy, eviction from the premises, consumption of food and beverages and incidental malpractice. It must be understood, however, that our coverage is for general public liability. It is not accident insurance covering initiated and uninitiated members for injuries sustained on the chapter premises and/or in chapter activities. Liability insurance is not a substitute for medical insurance. Further, it is not Workers’ Compensation Insurance, which may be required for chapter employees such as cooks and housemothers.

Insurer: Liberty Surplus Insurance Corporation
Policy Period: December 1, - November 30
Policy Numbers: DGLCH184369035
Adding Additional Insureds
Additional Insureds may be added to this policy. Such insureds may be your landlord, college, university and/or proprietor from whom the chapter may be renting property for a special event. **Request for an additional insured endorsement should be made in writing at least three weeks in advance of any event** and sent to Alpha Kappa Psi Fraternity Heritage Center, Attn.; Brian Parker, Managing Director of Operations, 7801 E. 88th Street, Indianapolis, IN 46256-1233. Phone (317) 872-1553, Fax (317) 872-1567. Upon approval of the request by the Alpha Kappa Psi Administrative Office and the insurance carrier Willis will issue a certificate of insurance with the original forwarded to the Additional Insured and a copy to the Heritage Center.

What Doesn’t Our Coverage Include?

i. Any claim of bodily injury and/or property damage from an incident resulting when:
   1) An illegal act was performed.
   2) An intentional act was performed.
   3) A contract made by the chapter is broken.
   4) There is any discharge, release or escape of smoke, vapors, soot, fume, acids, toxic chemicals, etc... upon land, the atmosphere of any water course or body of water.
   5) A chapter employee is hurt on the job. Each chapter with any employees must purchase Workers’ Compensation coverage locally.

ii. Any claim of property damage to property owned by, rented by, used by, or cared for by the chapter. An example, the chapter rents a portable generator for an outdoor function, and while it is in the care, custody and control of the chapter it is damaged and the lesser holds the chapter responsible and liable. No coverage is available under the Alpha Kappa Psi Fraternity liability insurance contract.

House Inspections
The insurance company has the right to make inspections and surveys at any time, give Willis Insurance and Alpha Kappa Psi Fraternity reports on the conditions that are found and recommend changes. Any inspections, surveys, reports or recommendations relate only to insurability and the premiums to be charged. Chapters and house corporations will be given advance notification of any inspections and copies of all reports.

Legal and Illegal Activity
Simply stated, no insurance policy in the world provides coverage for violations of the law. The Alpha Kappa Psi Fraternity insurance program is no exception to this rule. The key points to understand are:

- Compliance with federal, state, local and institutional (college or university) laws and regulations is required.
- Compliance with all regulations and policies of Alpha Kappa Psi Fraternity is required.

Those individuals who choose to violate these rules may void the protection for themselves under the Alpha Kappa Psi insurance program. **Every effort has been made to avoid their actions from jeopardizing the other members, other entities, or other named insureds protected by the Alpha Kappa Psi program.** The following brief examples are intended to provide illustration and do not represent legal advice.

i. With the broad awareness of its membership, the chapter serves alcohol to a minor in violation of the law at a chapter-sponsored function. In the event of an injury, claim or lawsuit, those persons found to be in violation of the law and/or Alpha Kappa Psi Policy (in this case the entire chapter) most likely would be without insurance protection. The other named insureds would be protected (i.e. the Fraternity, house corporation or alumni volunteers).

ii. Two of the members of a 65-man chapter cause injury to someone in connection with a hazing incident. This activity was unauthorized and done secretly without the knowledge of the chapter,
and strictly against chapter policy. In the event of an injury, claim or lawsuit, those persons (in this case, the two members) found to be in violation of the law and Alpha Kappa Psi Policy could be without insurance protection. The chapter, house corporation and other named insureds would be protected.

Great effort has been made to ensure coverage will be provided to those individuals and entities exposed to claims through no fault of their own. Chapters and chapter officers are protected from the unauthorized actions of individuals. The assets of house corporations are protected from the unauthorized actions of their chapters. Chapter Advisors are protected from the unauthorized actions of their individual chapter members and the chapter as a whole, as are the house corporations and all other appointed alumni volunteers involved with the Fraternity.

All questions regarding insurance interpretation and coverage should be directed to Willis Insurance. c/o Trude Smouse, 10707 Pacific Street, Suite 200, Omaha, NE 68114, Phone (800.736.4327, email smouset@willis.com.

**Hazing Policy**
Alpha Kappa Psi’s Hazing Policy can be found in the [Board of Director’s Statement of Policy](http://www.akpsi.org) and online at [www.akpsi.org](http://www.akpsi.org). It shall be the responsibility of all members of Alpha Kappa Psi Fraternity to determine college, university or other legal jurisdiction policy regarding hazing, mental or physical, and to comply totally with such policies.

**Hazing Prevention**
When organizations are challenged to eliminate hazing practices, some members are often resistant to this change. In many cases, those who are most vocal against eliminating hazing are those who are upset about the hazing they themselves endured (but don’t admit this publicly) and expect others should be “abused” as well in order to gain “true” membership in the group just like they did.

Of course, if you try to eliminate hazing in your chapter, you will likely encounter many elaborate reasons for why this will be devastating for your group. While there will be some staunch supporters of the status quo, there will be many who can be convinced of the negative effects and potential risks of hazing. Believers in the supposed “benefits” of hazing may be more likely to change their opinion if they can envision some alternatives. The following are supposed benefits hazers believe they accomplish and some alternatives you can instill in your chapter that will accomplish the same goal:

- **Foster unity:**
  - Brother retreat.
  - Visit a ropes course to work on group cohesiveness, communication and leadership skills.
  - Non drinking socials to learn about each other.

- **Develop problem-solving abilities:**
  - Have discussions about chapter weaknesses such as poor recruitment, apathy and poor scholarship, and develop solutions the chapter might then adopt (i.e. create a business plan).
  - Do groups for rituals so they can work under a deadline.

- **Teaches you to work under stress:**
  - Prepare a challenging fundraiser and see it through to the end.
  - Have an interview workshop to prepare you better for tough interviews.

- **Develop leadership skills:**
  - Encourage participation in school/campus activities outside of the chapter.
  - Encourage new members to get involved in committees and/or leadership roles.
  - Develop a peer mentor program within your group for leadership roles.
Invite school/community/business leaders into the chapter to share their experiences.

- Instill a sense of membership:
  - Start new traditions ~ it only takes a few academic terms for it to become a tradition.

Believe it or not:
Chapters found responsible of hazing have been required to eliminate hazing in order to stay open as a chapter of Alpha Kappa Psi. These chapters report that eliminating hazing increased member involvement therefore reducing apathy!

Parliamentary Procedure
Basic Principle: Minority is heard but majority rules

I. Establish a quorum
   A quorum is the number of people who must be present to take legal action on business matters and is essential to conducting business meetings. The quorum is stipulated in the bylaws, and before any business is discussed, the chair should establish for the record that a quorum exists.

II. All members have equal rights
    These include the right to make motions, debate, and vote. You need a two-thirds majority vote to deprive members of basic rights — such as closing or limiting debate and closing nominations. No member may be forced to vote, silence gives consent. General business — majority of those present

III. Debate, decorum, and order
    Only one main motion (one subject) may be considered at a time, and only one person may speak at a time. Anyone who wishes to make a motion should first be recognized by the chair and preface the motion with the words, “I move that.” If someone wishes to second the motion, that person does not have to wait to be recognized but merely calls out, “I second the motion.” Without a second motion, the chair moves on to the next agenda item. After the motion has been made and seconded, the chair restates the motion, which is termed a main motion. Discussion begins. To ensure order and that only one person speaks at a time, the chair recognizes members before they may speak. There must be an opportunity for at least one pro and one con for each motion and amendment. Technically, after a second is made, a motion cannot be withdrawn (not efficient to enforce).

IV. Amendments
    The purpose of an amendment is to change a motion already under consideration. If a member believes the right topic is being discussed but wants to modify the wording of the motion, he or she calls for an amendment. Technically, a motion may be amended, and the amendment to the motion may be amended, but no further amendments may be made. Amendments are motions, and as such, they require a second and full debate. Amendments can slightly change the main motion. Typically, if the author of the original motion agrees with the amendment it can be accepted as a “Friendly Amendment” and incorporated into the original motion without the need for debate or a vote.

V. Closing Debate
    A member who wishes to end debate may interrupt discussion and say “I move/call the previous question.” This motion requires a second and must receive a two-thirds majority vote. Should it receive a two-thirds majority, the chair then states, “The previous question has been called, all those in favor of the motion to...”

VI. How to Run a Meeting
    A. Decide how strict to be with parliamentary procedure — generally, the larger the group, the more strict you should be.
B. How will one be recognized to speak? — typically by raising your hand then being called upon by the chair. Large assemblies may have fixed microphones where lines are formed to speak.

C. Chair controls flow of meeting.
   i. Must appear unbiased, can never state an opinion on the motion before or during debate.
   ii. To be effective, must control flow of meeting by:
      iii. Quickly and decisively granting permission to speak.
   iv. Always watching that comments are being made at the appropriate times (a pro should be a pro, not a public service announcement; points of information should be questions not pros/cons). Always stop someone and ask him or her to explain his/her point if it sounds like the granted time is being appropriately used (if it sounds like someone is making a con during a point of information).
   v. Quickly and decisively making judgments on points of order.
   vi. Prompt for actions if meeting slows down (chair will entertain motion to _____ — such as close debate, open a window, consider “X”).
   vii. Don’t be afraid to take a recess if you need to clarify points or get some information.
   viii. Be quick to keep people in order (not speaking out of turn).
   ix. Don’t let debate get personal — name-calling is not allowed (try to get people to speak in the third person when referring to other people in the room and to address actions not people).

D. Use other resources — Warden, Parliamentarian, etc.

VII. Efficiency Tips
   A. Most motions can be voted on by acclamation (general consent).
   B. Use voice vote for motions. Chair’s ruling stands on results of voice vote unless “call for division” is called for, then vote count is needed.
   C. Chair cannot make motions but can offer to “entertain” a motion which may fix a particular sticking point in debate.
   D. If chair doesn’t know the answer to a “point of information,” he or she can call on someone else to answer it.

VIII. Potential Problems
   A. Noisy individual — warning from chair then warden removes.
   B. Bad environment (hot, cold) — chair can recess meeting to try remedy the situation.
   C. People speaking without being recognized — reminder from chair to wait to be recognized, if doesn’t work, warning from chair then warden removes.
   D. Debate lasting too long — “without objection, chair ends debate after two or more pro/cons.” (Two of the same back-to-back.)
   E. Meeting lasting too long — “without objection, chair rearranges agenda and will postpone consideration of certain items until next meeting.”
   F. Everyone wants to speak — in the order they raise their hands, a list is made, chair simply calls names off this list.

“Entrepreneur Larry Wilson defined the difference between passion and drive as the difference between expressing yourself and proving yourself.” — On Becoming a Leader By Warren G. Bennis
## Parliamentary Procedure at a Glance

Here are some motions you might make, how to make them, and what to expect of the rules.

<table>
<thead>
<tr>
<th>To Do This:</th>
<th>You Say This:</th>
<th>May you interrupt the speaker?</th>
<th>Do you need a second?</th>
<th>Is it debatable?</th>
<th>Can it be amended?</th>
<th>What vote is needed?</th>
<th>Can it be reconsidered?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADJOURN MEETING</td>
<td>&quot;I move that we adjourn&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>CALL AN INTERMISSION</td>
<td>&quot;I move that we recess for...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>COMPLAIN ABOUT HEAT, NOISE ETC.</td>
<td>&quot;I rise to a question of privilege&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No (usually)</td>
</tr>
<tr>
<td>TEMPORARILY SUSPEND CONSIDERATION OF AN ISSUE</td>
<td>&quot;I move to table the motion&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>I CALL QUESTION</td>
<td>&quot;I move the previous question&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>END DEBATE AND AMENDMENTS</td>
<td>&quot;I move to postpone the discussion until...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>GIVE CLOSER STUDY OF SOMETHING</td>
<td>&quot;I move to refer the matter to committee&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes 2</td>
</tr>
<tr>
<td>AMEND MOTION</td>
<td>&quot;I move to amend the motion by...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>INTRODUCE BUSINESS</td>
<td>&quot;I move that...&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**The motions listed above are in order of precedence... below there is no order...**

| PROTEST BREACH OF RULES OF CONDUCT    | "I rise to a point of order."                                                 | Yes                           | No                    | No              | No                | No Vote             | 4 No 5 Yes |
| VOTE ON A RULING OF THE CHAIR         | "I appeal from the chair's decision"                                          | Yes                           | Yes                   | Yes             | No                | Majority            | Yes 6 7 |
| SUSPEND RULES TEMPORARILY             | "I move to suspend the rules so that..."                                      | No                            | Yes                   | No              | No                | 2/3                 | No 6 7 8 |
| AVOID CONSIDERING AN IMPROPER MATTER | "I object to consideration of this motion"                                    | Yes                           | No                    | No              | No                | 2/3                 | No 6 7 8 |
| VERIFY A VOICE VOTE BY HAVING MEMBERS STAND | "I call for a division" or "Division!"                                      | Yes                           | No                    | No              | No                | No Vote             | No 6 7 8 |
| REQUEST INFORMATION                   | "Point of information."                                                       | Yes                           | No                    | No              | No                | No Vote             | No 6 7 8 |
| TAKE UP A MATTER PREVIOUSLY TABLED    | "I move to take from the table..."                                            | No                            | Yes                   | No              | No                | No                  | Majority            |
| RECONSIDER A HASTY ACTION             | "I move to reconsider the vote on..."                                         | Yes                           | Yes                   | 6 No              | Majority            | No                  |

**Notes:**
1. Unless vote on question is not yet taken.
2. Unless the committee has already taken up the subject.
3. Only if the motion to be amended is.
4. Except in doubtful cases.
5. A majority vote in negative needed to prevent reconsideration of main motion.
6. Only if the main question or motion was not, in fact considered.
7. Only if motion to be reconsidered is debatable.
8. Only if motion to be reconsidered is debatable.
The master of rituals has one of the most important responsibilities of any of the chapter officers. The initiation ceremony is the most important ritual in a member’s life, and will be remembered by the initiate forever. Your attention to detail will make it remembered as an impressive culmination of membership.

*The Ritual* gives all of the instructions necessary to conduct each of the ceremonies. Any questions you have after reviewing *The Ritual* should be directed to your Chapter Advisor, Section Director or Regional Director. The following actions will ensure your term starts off on the right foot:

- Attend the weekly executive board meeting.
- Secure materials from the outgoing MOR and review/inventory supplies.
- Secure all ritual books and ritual materials from the outgoing MOR. Ensure you have enough pledge buttons and membership buttons for the upcoming term; if not order more for inventory from the fraternity marketplace.
- Make sure you are familiar with the fraternity handgrip, password and motto. Ask other chapter officers, your chapter advisor, section director or regional director if necessary.
- If you must reserve specific rooms for the performance of the rituals, do so at the earliest possible date. The previous master of rituals should have noted the process necessary to reserve rooms. Remember to reserve a holding room for participants as well as the actual ritual room.
- Review the ritual manual for each type of ritual.
- Planning is key. Work with vice president of alumni relations to get alumni support early.
- Stress seriousness of rituals to brotherhood.
- Coordinate with your ritual team to ensure each ritual is prepared for properly.
- Be well prepared (plan on the worst case scenario).
- Always have a backup plan.

**Overview**

**What are Alpha Kappa Psi Rituals and what do they mean?**

- To the Fraternity:
  - Backbone.
  - Founding fathers — created to represent what the fraternity means to us internally. The rituals are an explanation of who we are and how we should conduct ourselves in business and in life.
- There are ten (10) rituals of the Fraternity.
  - Closed Rituals:
    - Induction – very first glimpse of Alpha Kappa Psi a pledge experiences and is the first step toward becoming a brother.
    - Mid-Court – the Mid-Court interview is the time for serious evaluation of the pledges. Your chapter must determine if the pledges are sufficiently prepared, dedicated to the ideals of our Fraternity and ready to continue in the program.
    - Court of Honor – very similar to the Mid-court interviews; however dropping pledges at this point should be RARE and only in extreme circumstances; preapproval from the regional director is required. This ritual is best when headed by alumni members and/or a chapter advisor, regional or fraternity representative if possible.
    - Initiation of Student/Faculty Members – performed to bring new members into the brotherhood.
Public Rituals:

- Graduating Senior Ceremony – Performed as a renewal of graduating seniors’ fraternal obligations as they prepare to enter the “real world.”
- Chapter Colonization – To acknowledge the colonization efforts of an expansion organization.
- Initiation of Honorary Members – Performed to recognize honorary members.
- Installation of Officers (Local) – Performed as a formal recognition of newly elected officers.
- Installation of Officers (regional and fraternity) – Same as above.
- Installation of an Alumni Chapter – Performed to bring an alumni group into full recognition.

“The quality of a person’s life is in direct proportion to their commitment to excellence, regardless of their chosen field of endeavor.”

Vince Lombardi
<table>
<thead>
<tr>
<th>Ritual</th>
<th>Date Performed</th>
<th>Participants</th>
<th>Equipment needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pledge Induction</td>
<td>Bi-Annually at the</td>
<td>President, Master of Rituals, VP of Membership, Warden, Guide</td>
<td>Pledge Pins, Robes (optional), Obligation Ledger, Pen, Gavel</td>
</tr>
<tr>
<td>Purpose: To impress upon the prospective members the serious obligation of AKPsi</td>
<td>beginning of each pledge period</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Chief Executive, 2 Executive Board Members, Presenter, Warden, 2 Guides</td>
<td>Robes (if available), Gavel, White cloth for head table, For Final: 3 lighted candles, -Pledges bring thesis, resume, &amp; object symbolic of AKPsi</td>
</tr>
<tr>
<td>Mid-Term Interview / Court of Honor</td>
<td>Middle of pledge program</td>
<td>President, Master of Rituals, Chaplain, Warden, Merchant, Banker, Accountant Guide, Front and rear Guard, Fraternity Officer/RD/CA or SD (if available), Musician (optional)</td>
<td>Robes (if available), Coat of Arms, Jeweled Badge, Gavel</td>
</tr>
<tr>
<td>Purpose: Serious evaluation of pledges; to test the knowledge of the pledges and discover their intentions upon becoming a brother</td>
<td>End of pledge program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiation of Members (Student/Faculty)</td>
<td>Should follow Court of Honor</td>
<td>President, Master of Rituals, Chaplain, Warden, Merchant, Banker, Accountant Guide, Front and rear Guard, Fraternity Officer/RD/CA or SD (if available), Musician (optional)</td>
<td>Robes (if available), 2 Bibles, Coat of Arms, Jeweled Badge, Gavel, 10 candles with holders, Charter to display (if available), AKPsi banner, Altar cloth w/Coat of Arms, Recognition pins, Master Ritual and pen for signatures, Typed list of pledges’ full names, Cassette/CD (optional), Flashlights (if needed)</td>
</tr>
<tr>
<td>(Also College Chapter Installation)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purpose: Final ceremony to install a pledge as a Brother for life</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ceremony for Graduating Seniors</td>
<td>End of semester/quarter</td>
<td>Guest Speaker (a Brother), President, Master of Rituals, Master of Renewal (RD, SD or Alumni/Faculty member), Warden</td>
<td>Robes (only if closed to brothers), AKPsi banner, Coat of Arms, Jeweled Badge, Gavel, Podium for speaker</td>
</tr>
<tr>
<td>Purpose: A renewal of fraternal obligations which continue throughout life for those brothers who are graduating</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chapter Colonization</td>
<td>Suggested to conduct</td>
<td>President, Master of Rituals, Warden, Guide</td>
<td>recognition key, Pen, Gavel</td>
</tr>
<tr>
<td>Purpose: To acknowledge the colonization efforts of an expansion organization</td>
<td>at a banquet so initiate can address the chapter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiation of Honorary Members</td>
<td>Soon after election</td>
<td>Outgoing President, Warden, Chapter Advisor</td>
<td>Gavel, Gavel to Pass, Charter to display (if available)</td>
</tr>
<tr>
<td>Purpose: Formal recognition of newly elected officers</td>
<td>At conclusion of the election</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Installation of Officers (Local Chapter)</td>
<td></td>
<td>Regional Director, Fraternity Officer, Section Director (as Chaplain)</td>
<td>Gavel, Coat of Arms, Jeweled Badge, Banner, Altar cloth w/Coat of Arms (if avail)</td>
</tr>
<tr>
<td>Purpose: Formal recognition of newly elected officers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Installation of Officer (Regional and Fraternity)</td>
<td></td>
<td>Regional Director, Fraternity Officer, Section Director (as Chaplain)</td>
<td>Gavel, Coat of Arms, Jeweled Badge, Banner, Altar cloth w/Coat of Arms (if avail)</td>
</tr>
<tr>
<td>Installation of an Alumni Chapter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purpose: Brings an alumni group into full recognition by the Fraternity with full voting rights</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
Rituals

I. Preparation for Rituals
   a. To be taken seriously – remember where you are and what you are doing.
   b. Thoroughly prepare for all rituals – use a ritual team to prepare.
   c. Materials
      i. White sheets
      ii. Candle holders
      iii. Plenty of extra white candles
      iv. Matches or a lighter
      v. Small flashlights
      vi. Ritual books
      vii. Robes

II. Mid-Court Rituals
   a. Prepare notes
   b. Prepare questions you will ask
   c. Organize
   d. Memorize – know your history by heart!
   e. Speak with heart and emphasis

III. Verbiage of Introduction, Correction and Release
   a. Sample Introduction
      i. “Pledge (last name), Welcome to your Mid-Court/Court of Honor.”
   b. Sample Corrections – Never interrupt a pledge!
   c. Sample Release
      i. “Pledge (last name), do you understand everything you have seen here, heard here and said here should be held in strict confidence and should be shared ONLY with true brothers of Alpha Kappa Psi fraternity? [wait for response] Thank you. I am returning you to the holding room.”

IV. The Brotherhood’s role in the Mid-court ritual
   a. While the MOR asks questions related to the fraternity and our history, the brotherhood is responsible for finding out more about the pledge through a series of questions.
   b. Ask questions about:
      i. AKPsi — intentions, goals
      ii. Ethics — pose situations, ask for reaction/response
      iii. Current Events — demonstrate well roundedness
      iv. Sample Questions — Ritual Book, Book of Questions
         a. Questions should be from list or approved in advance.

V. Management and Control of Rituals
   Master of rituals is the leader of all rituals, but not a dictator. He or she is personally responsible for everything that occurs in the ritual room, including but not limited to, the actions of brothers, alumni and justices.
   a. Preparation is the key to a successful ritual.
      i. Master of rituals must have all materials prepared beforehand.
   b. Brotherhood must be prepared as well.
      i. Prepare questions in advance.
ii. Determine order of questions.
iii. Sit in groups (if that will be helpful).
iv. Say “thank you” after pledge successfully and completely answers your question(s).
c. Mid-courts are NOT an opportunity to browbeat, abuse haze or yell at pledges.
   i. Professional interview
   ii. All wear professional attire
   iii. Inappropriate dress, poor behavior warrants removal of any brother from the ritual and possible further disciplinary actions.
d. Timing and movement of pledges between holding room and ritual room.
   i. Escort each pledge.
   ii. Timed so that there is a smooth flow from one pledge to the next.
e. Holding room
   i. Remind the pledges to think seriously and prepare for the evening ahead.
   ii. Breaks – give the pledges the opportunity to use the restroom.
f. Vow of Silence
   i. The Vow of Silence cannot be enforced – this is considered hazing by fraternity policies. Pledges can be asked to keep a quiet environment so that everyone can have an environment in which to study or reflect.

VI. Removing a Pledge
Procedure: it is your right and duty as a brother to speak your mind about any pledge you feel is not an excellent candidate for brotherhood. It is also your duty to accept whatever decision the brotherhood makes as a whole. Your loyalties must always remain with the brotherhood and its decisions.
   a. Per PEP, all pledges must have a documented pledge action plan prior to removal. Additionally enough time must be provided to properly execute and evaluate the plan.
   b. Run by MOR.
   c. Names of those wish to be brought up, collected and announced by MOR.
   d. Discussion and voting in alphabetical order of pledges.
   e. Votes counted by VP of membership and Warden.
   f. Announcement of results only after all pledges discussed and voted upon.
   g. There is a 1-25% vote required to remove a pledge (check your chapter Bylaws).
   h. Pledges voted to be removed can only be brought up for vote two times (per Statutory Code).
   i. Who was brought up and what was said must be held in the strictest confidence.
   j. All pledges should be seriously evaluated at Mid-Court and that is time to vote pledges out of the program if necessary. Only in rare, extreme cases should a pledge be voted out at Court of Honor; preapproval must be obtained from the regional director. This decision must be documented and retained by the chapter.

VII. Court of Honor
   a. Invite alumni, regional, sectional and/or fraternity representatives to be justices.
      i. Write invitations on AKPsi stationary AT LEAST six weeks in advance.
      ii. Make follow up phone calls four weeks and two weeks in advance.
   b. Prepare information for Court of Honor Justices.
   c. Prepare an agenda for the event, including where and when to meet (include directions).
   d. Justices should be professionally dressed; consumption of alcohol and drugs, prior to or during any ritual is strictly prohibited.
   e. Send or give materials to Justices in advance if at all possible.
i. Resumes, goals papers, order of pledges.

f. Meet with Justices early on the day/eve of Court of Honor and Initiation. Please refer to The Ritual of Alpha Kappa Psi for acceptable questions.
   i. Determine who will ask what questions.
   ii. Answer any last minute questions.
   iii. Clearly communicate your expectations and define what is acceptable and unacceptable.
        You are responsible.

g. Send thank you notes right away.

VIII. Induction and Initiation
   a. All speaking parts should be memorized and rehearsed at least a week in advance.
   b. Rooms should be prepared according to the The Ritual of Alpha Kappa Psi.

Ritual Guidelines and Hints
- All rituals are to be conducted in strict compliance with the official ritual of AKPsi – the vow of silence cannot be used.
- Always hold a pledge evaluation session at Mid-Court.
- A pledge should never be removed at or after Court of Honor unless it is an extreme circumstance.
  o If, in very rare circumstances, the brotherhood needs to see a pledge before reaching a decision about removing a pledge before Court of Honor, conduct another Mid-Court for that pledge.
- The consumption of alcohol and use of drugs during or prior to any ritual(s) is strictly prohibited.
- No ritual or consecutive set of rituals, official or not, can last more than 8 (eight)-hours. This time limit begins from the earliest time the pledges were told to arrive until the final adjournment for the same group.
- There must be a ten-hour break between rituals. This rule is in effect for a ritual or set of consecutive rituals that have lasted up to eight hours.
- Rituals cannot start before 8:00 am or continue past 11:00 p.m.
- Alumni should serve as justices whenever possible at Court of Honor, members of the BOD, MT or RMT should serve as Chief Justices when present in order of their position in the fraternity.
- Brothers and/or pledges must be allowed the opportunity to have a meal if the rituals or set of consecutive rituals, official or not, is scheduled to last, or in reality lasts, more than five hours. While food and beverages do not have to be provided, the opportunity to bring/get it, including reasonable travel time and time to consume it (not less than ½ hour) must be allotted and shall be part of the eight-hour limit.
- There shall be a mandatory ten-minute break every two hours of rituals or set of consecutive rituals.
- Court of Honor, Initiation, and Officer Installation must be conducted and concluded a minimum of eight (8) days prior to the first official day of exam week unless approved by the regional director prior to Induction.
**Professional Interview Questionnaire**

The following is a list of acceptable **SUBJECTIVE** questions to be used during the Mid-Court Interview and Final Interview for candidates:

1. What is your personal "code of ethics?" Has Alpha Kappa Psi or your education at this school influenced them in any way?
2. Why did you choose your major and why is AKPsi of interest to you?
3. What will you bring to Alpha Kappa Psi via this college and/or through future professional alumni involvement?
4. Who in the business world would you most consider as your role model? Who do you most admire? Why?
5. In an employment situation, under what circumstances would you be able to "fire" or "reprimand" an Alpha Kappa Psi brother?
6. Define brotherhood and professionalism; discuss their interrelationships.
7. What office will you seek in this chapter? Why? How would you improve the current management of the chapter?
8. Do you have any personal expertise which may benefit the Fraternity? Describe in detail.
9. How do you anticipate Alpha Kappa Psi benefiting your career?
10. Why do you strive to be a brother of Alpha Kappa Psi?
11. What are your strong character traits? How will you utilize these traits to advance your career and/or Alpha Kappa Psi ideals?
12. What are your weak character traits and how do you compensate for them?
13. Describe your greatest success within your candidate program.
14. Describe the one event you would consider the greatest success to come about from your candidate program. How did you contribute?
15. An integral part of any future job will be communication with supervisors, coworkers and subordinates. Describe how you utilized the past several weeks in AKPsi to develop good communication skills.
16. What were your candidate class' shortcomings? How were you involved?
17. What changes or improvements would you make in the candidate program?
18. Today's management acknowledges the benefit of encouraging employees to build social relations in promoting a healthy productive work environment. What efforts did you make to build social interaction among your fellow candidates?
19. Many companies stress the importance of teamwork. What efforts did you make towards ensuring teamwork among your fellow candidates?

**Court of Honor Questions**

Please refer to *The Ritual of Alpha Kappa Psi* for acceptable questions.
Frequently Asked Questions

What due dates do I need to know?
The most accurate and up-to-date due dates for your chapter are listed on [www.akpsi.org](http://www.akpsi.org). Check out the Calendar of Chapter Due Dates for the most up-to-date calendar planning.

When are the chapter minutes due?
Within seven days of your meetings. The Executive and Chapter Minutes are to be sent to the CA, SD and RD. All minutes should be sent to chapter members with 24 hours of the meeting.

What if the chapter roster is inaccurate?
Correct it immediately by logging into the chapter reporting tools at [https://www.akpsi.org/cmt](https://www.akpsi.org/cmt). Remember your dues and insurance billings are based on your roster.

Can first-year students pledge?
There is not a minimum GPA to pledge Alpha Kappa Psi, therefore freshman can pledge. Refer to the Statutory Code (Caput II Section 6) for more information.

Is there an inactive status?
No, circumstances such as internships, co-op, student abroad, military duty or medical/ extreme hardship are considered for Leave of Absence status. Special exceptions have been made for those who are extremely ill, pregnant, etc., but approval is required by your RD. These members must be reported as Leave of Absence and they are to re-affiliate (and be reported as doing so) upon their return. There are NO “social memberships,” “senior status,” etc. Leave of Absence status is different than suspension due to attendance issues and/or financial delinquency.

How can a member be removed in good standing?
Only by leaving the university; this could be because they “drop out” of school, graduate with the degree in which they pledged (even if they stay on for grad school), transfer to another school or branch of your school (more than 50 miles).

Are there any circumstances when the brother must re-affiliate?
Yes, if the brother returns to the university at which their home chapter is located to complete the degree in which they pledged. (Examples of this would include conclusion of internships, co-op, and medical leave of absence.)

What are the different membership forms?
Chapter rosters can be updated online using the Chapter Management Tools at [http://www.akpsi.org/cmt](http://www.akpsi.org/cmt). Once you update your roster online, an e-mail is automatically sent to you confirming these changes have been requested. A second email will be sent once the changes are approved by the Heritage Center. Any officer currently reported to the Heritage Center can access the Chapter Management Tools.

- **Report Pledges** – Reporting of all new pledges. Information required: Full name, address, phone, e-mail address, date of birth, expected graduation year, induction date and expected initiation date. Download the Pledge Information Collection Form and have the pledges fill one out for easier input into the website. Due within seven business days of induction.
- **Report Initiates** - Reports your new brothers. Due within seven business days of initiation.
• **Chapter Roster Management** – Report status changes (graduating seniors, suspended brothers, leave of absences) and officer changes (incoming and outgoing officers; must be one of seven positions found in the *Constitution*; President, VP of Membership, VP of Admin, VP of Alumni Relations, Treasurer, Secretary, and MOR). A reason must be given for each suspension and Leave of Absence.

• **Member Reinstatement Form** – Reports brothers reinstated from temporary removal; also used to report affiliation of a brother who transfers from one university to another and joins the chapter.

**Can a brother resign from the fraternity?**
The membership of a member of the fraternity shall terminate upon the receipt of the member’s written resignation by the CEO of the fraternity or upon the member’s death. Any resignation does not relieve the member of any obligation incurred or commitments made before the resignation. (*Constitution, Article II, Section 8D*). Chapters cannot resign their members, members can only resign themselves.

A brother who resigns cannot attend any fraternity meetings, rituals or events and should not refer to his or her former membership or fraternity experiences in any document, such as résumés, employment applications, or job interviews.

**Can a chapter purchase alcohol?**
It cannot! See the risk management policies in the *Board of Directors Statement of Policy*.

**What is the chapter’s fiscal year?**
Per the *Constitution and Statutory Code* each chapter shall follow the fiscal year of April 1 – March 31. NO EXCEPTIONS.

**What is an audit and when should it be done?**
It is a review of all income and expenses and serves to ensure to the chapter, the outgoing treasurer and the incoming treasurer all funds have all been properly accounted for and any questions are resolved in a timely fashion. It should be done at the end of the treasurer’s term by the audit committee, should not include the treasurer and preferably will include at least one faculty/alumnus/CPA. A copy of the chapter audit is due to the Heritage Center by May 31 of each year after the conclusion of the chapter fiscal year (March 31). Chapters are encouraged to reference the *Chapter Audit Manual* for assistance.

**What are officer evaluations and when should they be done?**
Officer evaluations are an opportunity for the brothers to give the officers of the chapter feedback and constructive criticism on themselves in several categories. Some chapters do this once an academic term (after the first third of the term); others do it twice an academic term (at the 1/3 point and at the 2/3 point). It should be stressed that this is not personal and should be used as an anonymous way to help each officer grow and develop on a professional level. A sample officer evaluation can be found in the *Road to Brotherhood*.

**What is an incident report and when do I send one?**
An incident report is filled out whenever a negative event occurs, especially one which could result in legal issues, whether a lawsuit or police or judicial action. Examples are anytime the “authorities” (police, ambulance, univ. etc.) are involved. Even if you think it will “go away,” you should document it! Always consult with the RMT if there is even a question. When in doubt write it out! Incident forms can be found online in the *Insurance and Claims Manual*.

**How do I know who to send copies to?**
Anything sent to the Heritage Center should be copied to the RMT. Most items will be sent to CA, SD and RD.

**What is a Judicial Review Board?**
The purpose of the Judicial Review Board is to create a mechanism by which effective and efficient disciplinary action may be taken against brothers or pledges of the chapter in a timely fashion. This provision is not intended and shall not, at any time, circumvent any of the rights and privileges granted to the same by the Bylaws, the Constitution and Statutory Code or the Board of Directors Statement of Policy of Alpha Kappa Psi.

**MISSION:** The Judicial Review Board may review any action by, of, or between pledge(s), brother(s), and their guest(s) (for those actions they will be held accountable) which may be considered inappropriate behavior, detrimental to the reputation of Alpha Kappa Psi and this chapter, or endangers the continuous smooth operations of this chapter. The Judicial Review Board ensures that a complete and thorough investigation is conducted, establishing the validity of the charges, and, if valid, the guilt or innocence of the accused and establishing an equitable punishment in the case of the former.

The Judicial Review Board is a formal remedy for serious or severe grievances against members of Alpha Kappa Psi. Any personal or minor problems can usually be settled through more informal channels. The Judicial Review Board is also responsible for hearing appeals by members who have been fined for any reason. The Judicial Review Board is encouraged to contact the Fraternity Judiciary Committee with any questions or uncertainties.

The Judicial Review Board should not need to be utilized more than a few times an academic term. If the Judicial Review Board is being utilized too frequently this is an indication of deeper problems within the chapter and the Judiciary Committee should be consulted.

Anytime the Judicial Review Board conducts an investigation it is to fill out an Investigation Report Form found online and submit it to the Judiciary Committee. Anytime an investigation is due to an alleged violation of a risk management policy (hazing, alcohol or sexual harassment) the chapter must forward this information onto the Judiciary Committee for final review and ruling.

For more information on Judicial Review Boards, see the Judiciary Committee Operations Manual found online at [www.akpsi.org](http://www.akpsi.org).

**Where can I go to get additional education?**
Additional education is available through webinars and eLearnings on [www.akpsi.org](http://www.akpsi.org). They offer an opportunity to supplement your programming schedule with topics that are more difficult to find locally. The webinar schedule and topics change each academic year. For the most current schedule and to register go to [https://www.akpsi.org/webinars](https://www.akpsi.org/webinars).

All webinars are recorded and placed in the webinar library which you can access at any time here. Simply go to [www.akpis.org/webrecordings](http://www.akpis.org/webrecordings) to find a topic!

All eLearning programs can be found here: [www.akpsi.org/elearning](http://www.akpsi.org/elearning).
Here are some common words and abbreviations used in Alpha Kappa Psi:

- **ACR**: Annual Chapter Report: chapter operations reporting tool
- **AVP**: Area Vice President: Leads an Area of AKPsi
- **BOD**: Board of Directors: group within fraternity responsible for setting policy and fraternity direction
- **BoDSoP**: Board of Directors Statement of Policy
- **CA**: Chapter advisor: An alumnus member who guides a chapter
- **CAB**: Chapter Advisory Board; smaller time commitment positions in specialty areas (recruitment, finance, etc.), under the direction of a chapter advisor and assist one specific chapter
- **CoL**: College of Leadership: held jointly with Convention
- **EVP**: Executive Vice President: assists the president
- **FA**: Faculty advisor: faculty member that guides a chapter
- **HC**: Heritage Center: central office for the fraternity, foundation and paid staff members
- **Induction**: Ceremony to become a pledge
- **Initiation**: Ceremony to become a brother
- **JC**: Judiciary Committee: reviews issues as related to the risk management policies on behalf of the fraternity
- **JRB**: Judicial Review Board: reviews membership issues within a chapter as pertains to rules and regulations
- **MT**: Management Team: consists of the president, executive vice president and 13 regional directors
- **OT**: Officer Training
- **PBLI**: Principled Business Leadership Institute
- **PEP**: Pledge Education Program: The only approved pledge program of the fraternity
- **RD**: Regional Director: oversees the chapters and volunteers within their region
- **RMT**: Regional Management Team: consists of CAs, FAs, SDs, regional managers and RD
- **RTB**: Road to Brotherhood: comprehensive membership program following the lifecycle of a brother from recruit to alumni
- **SD**: Section Director: oversees chapters within a portion of a region
- **YRS**: Yellow Rose Society: student giving program sponsored by the Alpha Kappa Psi Foundation
If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.
John Quincy Adams
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Alpha Kappa Psi Vision, Core Values and Guiding Principles

The Alpha Kappa Psi Vision, Core Values and Guiding Principles should be the foundation for any chapter activity. As an officer it is important to educate other members about their significance. Let these guide you and be the foundation of decisions and discussions.

Vision
Alpha Kappa Psi is recognized as the premier developer of principled business leaders.

Core Values
Brotherhood | Trust, respect, cooperation, companionship and aid to brothers is the expected norm
Knowledge | Education and experience is emphasized and shared
Integrity | All actions, whether in business or in life, are guided by honesty, ethics and fairness
Service | Sharing of time, talent and treasure with society and our fraternity is a priority
Unity | A common understanding of our vision and values that transcends chapter, generation and profession is utilized to anticipate and create the future

Tagline
Alpha Kappa Psi — Shaping People, Shaping Business

Guiding Principles
Building Brotherhood | The esoteric quality we call "Brotherhood" is of vital importance though difficult to define. Our members, from the day they become brothers until the end of their lives, foster a great love of the fraternity and a fondness for brother members. While brotherhood manifests itself in a multitude of ways, at its center is a sense of duty and respect for both the fraternity and individual members. All activities and decisions that involve the fraternity are guided by a sense of stewardship and selflessness. Members are anchored by the need to do what is in the best interest of the fraternity as a whole and are not swayed by individual self-interest.

Lifelong Learning | College is merely the beginning of business education. Our members share their knowledge and experiences openly with the people they work with, regardless of rank or position. In addition, they seek out opportunities to share their real-world experience with brother members, and in doing so they enhance the lifelong learning of those members.

High Ethical Standards | While the business world offers many opportunities for success and advancement, it also requires us to make decisions about how we succeed. Our members understand the importance of making decisions and conducting business in a way that takes into account both legal and ethical considerations. Our members serve as role models through their consistently fair and ethical conduct.

Improving Communities | Much is expected of those to whom much is given. Business professionals who seek to improve the communities in which they do business improve lives and develop goodwill. Our members actively give back to their communities through volunteer activities and monetary support.

Enhancing the Fraternity for Life | College chapters serve as living laboratories for classroom concepts and professional conduct. In turn, lessons learned in the fraternity prepare members for success in the business world. Because they recognize the value and importance of our Fraternity, our members are united in their
passion to build a legacy for the future. They support the fraternity through volunteer leadership and monetary gifts.
Director of Communication | Jennifer L. Adamany, San Diego ’05-Life
Ext 106
Contact Jennifer about:
- Branding
- Communication Technology
- Marketing

- Media Relations
- Publications
- Website

Director of Communication and Information Services | Christopher W Pye, Shippensburg ’04-Life
Ext 119
Contact Chris about:
- Career Center (online)
- Marketing
- Project Reconnect

- Surveys (online)
- Technology
- Website

Director of Alumni Development | Jeffery D. Hughes, South Florida ’00-Life
Ext 108
Contact Jeff about:
- Affinity/Royalty
- Alumni Association
- Alumni Awards
- Alumni Chapter Information
- Alumni Development

- Alumni Chapter Expansion
- Alumni Listings
- Chairman’s Advisory Council
- Life Loyal Program

Director of Education | Jason R. Pierce
Ext 102
Contact Jason about:
- College of Leadership
- Educational Programming
- eLearning
- Event Speakers
- Officer Training

- Pledge Education Program
- RMT Training
- Road to Brotherhood
- Webinars

Administrative Assistance for Chapter Services | Melinda Rosenthall
Ext 116
Contact Melinda about:
- Annual Chapter Report
- Chapter Services
- Community Service
- Dean’s Council

- Recruitment
- Show Cause
- Student Awards
- Student Chapter Expansion
Chapter Educational Resource Coordinators

- Area 1: **Evie Eddins**, Florida State ’13 *(Ext 117)*
- Area 2: **Cady E. Tabeling**, Southern Indiana ’11-Life *(Ext 113)*
- Area 3: **Kortney Petry**, Ball State ’11 *(Ext 117)*
- Area 4: **Liz Vickers**, Stetson University ’11 *(Ext 114)*

Member Service Representatives

The Member Service Representatives are the "Voices of the Heritage Center." They are the customer service representatives who handle many day-to-day activities at the Heritage Center. The Member Service Reps can answer many of the general requests you may have.

Member Services | **Debby Orff**
---
*Ext 110*
Contact **Debby** about:
- Address changes
- Charters
- E-Mail Addresses
- Initiate Certificates
- Member Processing

AKPsi Marketplace/Foundation | **Hazel Collier**
---
*Ext 111*
Contact **Hazel** about:
- Address changes
- Jewelry Orders
- Merchandise Orders
- Officer Updates

Finances and Collections | **Cathy Cole**
---
*Ext 112*
Contact **Cathy** about:
- Address changes
- Chapter Account Information
- Chapter Collection Problems
- Invoice and Statement Processing

Administrative Assistance/Event Registration Services | **Judy Pawlus**
---
*Ext 104*
Contact **Judy** about:
- Address changes
- Event registrations
- Scholarship applications
Volunteer Fraternity Leadership

Fraternity Board of Directors (BOD)
The fraternity’s board of directors is composed of nine alumni members elected by the Chapter Congress for terms of three years. The board in turn elects its officers who are the chairman, vice chairman, treasurer and secretary. The responsibility of the board of directors is to set policies and procedures that will guide the fraternity into the future. It acts as the supreme governing body of the fraternity between meetings of the Chapter Congress. It is charged with approving the fraternity budget, setting annual goals of the fraternity, overseeing the performance of the CEO and, most importantly, strategic planning. In strategic planning, the board takes input from members through a variety of sources and determines the fraternity’s core values, its vision for the future, or in laymen terms — what does Alpha Kappa Psi want to be known for? Further, it is charged with the responsibility of measuring how programs assist chapters and members to reach the vision. The board is the “big picture” strategic thinker of the organization much like the board of a corporation. The chairman of the board is the highest ranking volunteer in the fraternity.

Management Team (MT)
The Management Team is the volunteer operational arm of the organization. It is composed of the fraternity president, executive vice president, four area vice presidents and 16 regional directors. The Management Team is charged with the responsibility of servicing the chapters of the fraternity within the guidelines of policies and procedures set forth by the board of directors. The Management Team also manages a vast number of fraternity alumni volunteers, such as regional managers, section directors, chapter advisors, and chapter advisory board. The fraternity president serves as the chairman of the Management Team, presides over meetings of the Chapter Congress and appoints operational committees. For a current list of officers and regional directors visit www.akpsi.org/mt.

- **The President and Executive Vice President** administer the important work of appointing, charging and monitoring committees; overseeing implementation of budgets, resource materials, and educational programs approved by the Board of Directors. The president may appoint a cabinet of volunteers for assistance (as approved by the Board of Directors).
- **The Area Vice President** is tasked with the administrative oversight of specific Regions/Regional Directors and for executing the tactical direction of Fraternity operations based on strategic guidance from the Board of Directors (BOD) while partnering with the Fraternity Staff
- **The Regional Directors** are responsible for leading and supervising their regions. They appoint regional management team members, run their regional officer training, attend conventions, and do other things that make the regional director position the undisputed toughest volunteer position in the fraternity.

Foundation Board of Directors
The Alpha Kappa Psi Foundation, founded in 1951, is a not-for-profit 501(c)(3) organization dedicated to promoting the ideals of AKPsi. Its mission is: providing resources for enhancing the educational experience of future business leaders. The governing body of the foundation is its board of directors. It is charged with the responsibility of setting polices, fundraising goals and plans, an operational budget, and the overall vision of the foundation. A professional staff oversees day-to-day activities. The foundation funds the Academy, All-AKPsi Academic Team, Case Competition award scholarships and numerous scholarships. So the fraternity can have quality speakers at its events (such as the Principled Business Leadership Institute or the College of Leadership), the foundation also underwrites expenses for many speakers through its Principled Business Leadership Fund.
Foundation Scholarships
Academy, Late June (all expenses paid):
The Academy is like no other Alpha Kappa Psi educational experience. It is an intimate, hands-on, challenging leadership development retreat. It is a unique program designed especially for those who demonstrate exceptional qualities for future business leaders. A limited registration cap and a remote location ensure that the experience is highly interactive. Through the generous support of Alpha Kappa Psi alumni, friends and Corporate America, the AKPsi Foundation pays all expenses for those attending the four-day experience.

Application deadline: Spring

All-AKPsi Academic Team:
The All-AKPsi Academic Team recognizes students who maintain excellence in academic standing while making positive contributions to their campus and community. The selection process measures an applicant's ability to balance the pursuit of a degree with the development of leadership skills, interactive extracurricular participation, and a sense of social responsibility. From among the team members, one or more outstanding individuals receive the Top Scholar Award and are recognized with educational grants.

Application deadline: Fall

Scholarships:
There are more than 30 scholarships available to Alpha Kappa Psi members. Some of these scholarships may have certain requirements. Visit akpsi.org for a current listing of chapter and Fraternity-wide scholarships.

Case Competition:
Through the foundation’s Case Competition, students are introduced to the realities of decision making – including incomplete information, time constraints and conflicting goals – giving them first-hand experience in analyzing business situations. The competition was designed to stimulate students’ thinking by challenging their capabilities and preparing them for future managerial decision making.

Leadership defined: Leadership is the art of mobilizing others to want to struggle for shared aspirations.
– The Student Leadership Challenge by Jim Kouzes and Barry Posner

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"I learned that a great leader is a man who has the ability to get other people to do what they don’t want to do and like it." - Harry Truman
Characteristics of a Leader

Are you a leader? Here is a brief list of leadership characteristics:

| Leaders are good teachers and great communicators. | Leaders are trustworthy and able to trust others. |
| Leaders have stamina. | Leaders subordinate their egos to the goals of the chapter. |
| Leaders do what they know is right, rather than what is popular. | Leaders know how to run meetings. |
| Leaders are good at managing time. | Leaders teach all members the basics of chapter operations. |
| Leaders do not condone incompetence, they replace it. | Leaders help establish realistic goals and set action plans for reaching these goals. |
| Leaders are reliable and open-minded. | Leaders successfully motivate members on the importance of reaching goals. |
| Leaders are good listeners. | Leaders recruit competent people. |
| Leaders act with integrity. | |
| Leaders inspire a vision. | |

Spotting Leadership Potential*

1. Future leaders show initiative and can resolve issues with minimal supervision instead of waiting around for constant direction.
2. Future leaders trust their own judgment and get on with the task at hand, taking responsibility and without fear of making mistakes.
3. Future leaders are thirsty for knowledge and seek mentors and role models as they understand there is much to learn.
4. Future leaders share their knowledge, recognizing that the more they give the more they receive in return. Knowledge hoarders do not make good leaders.
5. Future leaders accept they are not perfect and do not know everything, that they have limitations and do not know and cannot do it all. They are not afraid to show weakness.
6. Future leaders accept responsibility for their own mistakes. Taking ownership and taking risks increases the chance of error. Leaders admit, learn and move on without making excuses.
7. Future leaders take responsibility and don’t single people out or shift blame. Whilst any error is still acknowledged, it is ‘ours’ not the fault of an individual.
8. Future leaders inspire and bring out the best in others as their passion and drive are contagious and set the standard for others to aspire to.

Anyone who exhibits more than half of the traits listed above could be one of your emerging leaders and offered the training and development they need to maximize their capabilities.


“It’s a fine thing to have ability, but the ability to discover ability in others is the true test.”

-Elbert Hubbard
Life Management
Student leaders are not only organization leaders but also students, spouses and friends. In short, there is more to student leaders' lives than the organizations they lead. A key to balancing all the different roles student leaders must take on requires effective use of their time. The following are some brief hints on how to make the most of your time and some suggested personal characteristics of good time managers.

- **List your goals** | Start with long-term goals and then narrow down your short-term goals. Set your priorities, not only for your goals but the roles you must fulfill.

- **Make a daily "to do" list** | Set your priorities every day. This keeps you on track with your short-term and long-term goals.
  - **Start with the "A's"** | Categorize your list into A, B and C groups, with A being the most important. Then take the items in the B group and redistribute them to the A and C groups. This way you end up with a list of only high and low priorities. However, be careful to not ignore C items; if they are forgotten about they can turn into urgent A priorities.

- **Always ask yourself ...** | “What is the best use of my time right now?” Do this whenever you have a free moment.

- **Handle each item just once** | If you pick up a piece of mail or receive a note, handle it then and there. Do not set it down before you resolve it, even if that means making a note to yourself to handle it later.

- **Do it NOW** | Do not procrastinate. Remember every big project is just a lot of little projects put together. Take each element one at a time.

- **Delegate** | Give tasks to other people so they can help.

Motivation
How can one promote a higher level of intensity within the chapter? It’s EASY; just follow these 5-steps:

1. **Strive to create a strong sense of belonging for everyone involved in the group; the members should feel as if they are honestly needed for whom they are.**

2. **Foster discussion with the group to set clear and precise goals/objectives for the chapter and ensure progress is communicated and celebrated.**

3. **Establish a definition of what is expected of each brother so they realize the expectations others have of them.**

4. **Assign responsibilities challenging others within a range of abilities and interest. These should be responsibilities which contribute to reaching the goals/objectives.**

5. **Observe the progress of the chapter toward completing the goals/objectives.**

When motivating others, remember and understand their personal values may be different than yours. What makes sense to you may not make sense to them. By trying to see something from another person’s point of view and empowering brothers to do what they are passionate about will help the brother and the chapter grow.
**SMART Goals**

**Specific** - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

*Who:* Who is involved?
*What:* What do I want to accomplish?
*Where:* Identify a location.
*When:* Establish a time frame.
*Which:* Identify requirements and constraints.
*Why:* Specific reasons, purpose or benefits of accomplishing the goal.

**EXAMPLE:** A general goal would be, "Get in shape." But a specific goal would say, "Join a health club and workout 3 days a week."

**Measurable** - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as......How much? How many? How will I know when it is accomplished?

**Attainable** - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals. You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them.

When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

**Realistic** - To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love. Your goal is probably realistic if you truly *believe* that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

**Timely** - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.
The following action items will ensure your term starts off on the right foot. As a chapter officer, it is important that you are familiar with all the resources available to you and the chapter. These resources include materials produced by the Fraternity and local resources (volunteers, alumni) near your chapter. The key to a successful chapter is recognizing how much you can do and when to ask for help. There are thousands of alumni and volunteers who have been in your shoes and are willing to help. Use their experiences to enhance yours!

Action Items:
- Read this officer manual. You must know your duties and those of your fellow officers.
- Study the chapter Bylaws.
- Review the Board of Directors’ Statement of Policy. Pay special attention to the Risk Management policies. All of these are essential to a healthy chapter and are each officer’s responsibility.
- Review the Constitution and Statutory Code.
- Become familiar with Robert’s Rules of Order.
- Review the Ritual of Alpha Kappa Psi (version 8 or higher).
- Know the fraternity’s vision, core values and guiding principles.
- Log-in to www.akpsi.org to set-up a profile and become familiar with how to use the chapter reporting tools.
- Read the Road to Brotherhood; being familiar with it will be essential in order to properly use it as a reference tool.
- Review the Annual Chapter Report (ACR). The ACR allows you to work together with the chapter advisor and Fraternity to track key components of the chapter. The ACR will help you pass on historical information and chapter data to future members, as well as set short and long-term goals.
- Contact the chapter and faculty advisors to set up personal meetings.
- Set a time for weekly executive board meetings.
- Notify the Heritage Center staff, chapter advisor and regional director of any change in officer names for communication purposes. Ensure the chapter's mailing address is current.
- Become familiar with the resources found at www.akpsi.org.
- Understand the fraternity organizational structure so you can direct your questions to the correct place.
- Have an emergency contact plan so you can contact chapter members in case of emergencies.
- Be professional – you are the role model for the chapter’s behavior.

General Liability Insurance
I. INTRODUCTION
The purpose of this manual is to give you an understanding of insurance coverage provided and information to properly report all actual and potential liability and property claims with which you may become involved. A certificate of insurance showing proof of coverage is provided with this manual. The final responsibility for the success of the insurance program rests with our fraternity and chapter. It is always important to remember that our first line of defense in liability matters is loss prevention, next is loss control, and the insurance contract is the final line of defense. The undergraduate and alumni members’ willingness to understand and assume the responsibility of sound risk management practices is a cornerstone of our program. In the event that an incident or claim does arise, the Alpha Kappa Psi Fraternity Heritage Center and Willis Insurance, will oversee the effective handling of all incident and claim investigation. An incident reporting form that must be completed and submitted at the time of any incident that results in bodily injury or property damage can be found at www.akpsi.org in addition to a full insurance and claims manual.
II. LAWSUITS
There will be occasions when lawsuits may be served on a member of your chapter. As there is only a limited
time to answer a lawsuit, the following procedure applies:
   a) Treat any potential, actual claim or lawsuit as a high priority item.
   b) Utilizing the incident reporting form, note all relevant information.
   c) Forward the suit and incident report by U.S. Postal Service Express Mail to the Alpha Kappa Psi
      Fraternity, Heritage Center, Attn.: Brian Parker, Managing Director of Operations.

III. GENERAL LIABILITY CLAIMS
The types of General Liability claims can be numerous and usually arise out of conditions of a chapter’s
premises. They more than likely involve injury or damage to someone other than an employee or an officer of
the fraternity. While on the scene, if possible, get all names, addresses and phone numbers of all parties
involved, as well as any witnesses to the accident. Immediately complete the incident reporting form and
submit.

IV. WHAT SHOULD BE REPORTED?
Bodily injury to anyone other than an employee and any property damage for which there is a possibility that a
claim may be made against Alpha Kappa Psi Fraternity. Be sure to fully complete the enclosed incident
reporting form that will provide the needed information regarding the claim. It is imperative that all losses or
incidents be reported immediately to the Alpha Kappa Psi Heritage Center (See phone numbers and address
on below). The Alpha Kappa Psi Fraternity Heritage Center is responsible for providing the initial report of the
claim to HRH/Kirklin & Co, Inc. Once the claim report is sent to HRH/Kirklin & Co, Inc. you will likely be
contacted directly by HRH/Kirklin & Co, Inc. to discuss the incident. If you are unable to obtain necessary
details when first notified of any incident, still report any known facts.

V. INCIDENT/CLAIM REPORTING

| ATTN: Brian Parker                       | ATTN: Mick McGill                  |
| Managing Director of Operations        | Vice President, Client Advocacy    |
| 7801 E. 88th Street                   | 10707 Pacific Street, Suite 200    |
| Indianapolis, IN 46256-1233            | Omaha, NE 68114                    |
| (317) 872-1553 – Phone                 | (402) 898-4199 – Phone             |
| (317) 872-1567 – Facsimile             | mmcgill@willis.com                 |

VI. GENERAL LIABILITY INSURANCE PROGRAM
The following description is a summary only and is not intended to serve as a substitute for the actual
insurance contract. The Alpha Kappa Psi Fraternity insurance program provides Blanket Public General Liability
Coverage of $1,000,000 per occurrence with a $2,000,000 general aggregate for all participating chapter and
chapter house organizations. (See the end of this section for explanation of types of coverage.) The coverage is
for bodily injury and property damage. This protects the local chapter, its officers and members, the house
corporation and the fraternity, including appointed volunteers, from claims arising out of bodily injury and
property damage occurring at the premises or at chapter functions away from the premises. It also protects
against claims arising out of libel, slander, false arrest, invasion of privacy, eviction from the premises,
consumption of food and beverages and incidental malpractice. It must be understood, however, that our
coverage is for general public liability. It is not accident insurance covering initiated and uninitiated members
for injuries sustained on the chapter premises and/or in chapter activities. Liability insurance is not a substitute
for medical insurance. Further, it is not Workers’ Compensation Insurance, which may be required for chapter
employees such as cooks and housemothers.

Insurer: Liberty Surplus Insurance Corporation
Policy Period: December 1, - November 30
Policy Numbers: DGLCH184369035
Adding Additional Insureds
Additional Insureds may be added to this policy. Such insureds may be your landlord, college, university and/or proprietor from whom the chapter may be renting property for a special event. **Request for an additional insured endorsement should be made in writing at least three weeks in advance of any event** and sent to Alpha Kappa Psi Fraternity Heritage Center, Attn.: Brian Parker, Managing Director of Operations, 7801 E. 88th Street, Indianapolis, IN 46256-1233. Phone (317) 872-1553, Fax (317) 872-1567. Upon approval of the request by the Alpha Kappa Psi Administrative Office and the insurance carrier Willis will issue a certificate of insurance with the original forwarded to the Additional Insured and a copy to the Heritage Center.

What Doesn’t Our Coverage Include?

i. Any claim of bodily injury and/or property damage from an incident resulting when:
   1) An illegal act was performed.
   2) An intentional act was performed.
   3) A contract made by the chapter is broken.
   4) There is any discharge, release or escape of smoke, vapors, soot, fume, acids, toxic chemicals, etc... upon land, the atmosphere of any water course or body of water.
   5) A chapter employee is hurt on the job. Each chapter with any employees must purchase Workers’ Compensation coverage locally.

ii. Any claim of property damage to property owned by, rented by, used by, or cared for by the chapter. An example, the chapter rents a portable generator for an outdoor function, and while it is in the care, custody and control of the chapter it is damaged and the lesser holds the chapter responsible and liable. No coverage is available under the Alpha Kappa Psi Fraternity liability insurance contract.

House Inspections
The insurance company has the right to make inspections and surveys at any time, give Willis Insurance and Alpha Kappa Psi Fraternity reports on the conditions that are found and recommend changes. Any inspections, surveys, reports or recommendations relate only to insurability and the premiums to be charged. Chapters and house corporations will be given advance notification of any inspections and copies of all reports.

Legal and Illegal Activity
Simply stated, no insurance policy in the world provides coverage for violations of the law. The Alpha Kappa Psi Fraternity insurance program is no exception to this rule. The key points to understand are:

- Compliance with federal, state, local and institutional (college or university) laws and regulations is required.
- Compliance with all regulations and policies of Alpha Kappa Psi Fraternity is required.

Those individuals who choose to violate these rules may void the protection for themselves under the Alpha Kappa Psi insurance program. **Every effort has been made to avoid their actions from jeopardizing the other members, other entities, or other named insureds protected by the Alpha Kappa Psi program.** The following brief examples are intended to provide illustration and do not represent legal advice.

i. With the broad awareness of its membership, the chapter serves alcohol to a minor in violation of the law at a chapter-sponsored function. In the event of an injury, claim or lawsuit, those persons found to be in violation of the law and/or Alpha Kappa Psi Policy (in this case the entire chapter) most likely would be without insurance protection. The other named insureds would be protected (i.e. the Fraternity, house corporation or alumni volunteers).

ii. Two of the members of a 65-man chapter cause injury to someone in connection with a hazing incident. This activity was unauthorized and done secretly without the knowledge of the chapter,
and strictly against chapter policy. In the event of an injury, claim or lawsuit, those persons (in this case, the two members) found to be in violation of the law and Alpha Kappa Psi Policy could be without insurance protection. The chapter, house corporation and other named insureds would be protected.

Great effort has been made to ensure coverage will be provided to those individuals and entities exposed to claims through no fault of their own. Chapters and chapter officers are protected from the unauthorized actions of individuals. The assets of house corporations are protected from the unauthorized actions of their chapters. Chapter Advisors are protected from the unauthorized actions of their individual chapter members and the chapter as a whole, as are the house corporations and all other appointed alumni volunteers involved with the Fraternity.

All questions regarding insurance interpretation and coverage should be directed to Willis Insurance. c/o Trude Smouse, 10707 Pacific Street, Suite 200, Omaha, NE 68114, Phone (800.736.4327, email smouset@willis.com.

Hazing Policy
Alpha Kappa Psi’s Hazing Policy can be found in the Board of Director’s Statement of Policy and online at www.akpsi.org. It shall be the responsibility of all members of Alpha Kappa Psi Fraternity to determine college, university or other legal jurisdiction policy regarding hazing, mental or physical, and to comply totally with such policies.

Hazing Prevention
When organizations are challenged to eliminate hazing practices, some members are often resistant to this change. In many cases, those who are most vocal against eliminating hazing are those who are upset about the hazing they themselves endured (but don’t admit this publicly) and expect others should be “abused” as well in order to gain “true” membership in the group just like they did.

Of course, if you try to eliminate hazing in your chapter, you will likely encounter many elaborate reasons for why this will be devastating for your group. While there will be some staunch supporters of the status quo, there will be many who can be convinced of the negative effects and potential risks of hazing. Believers in the supposed “benefits” of hazing may be more likely to change their opinion if they can envision some alternatives. The following are supposed benefits hazers believe they accomplish and some alternatives you can instill in your chapter that will accomplish the same goal:

- Foster unity:
  - Brother retreat.
  - Visit a ropes course to work on group cohesiveness, communication and leadership skills.
  - Non drinking socials to learn about each other.
- Develop problem-solving abilities:
  - Have discussions about chapter weaknesses such as poor recruitment, apathy and poor scholarship, and develop solutions the chapter might then adopt (i.e. create a business plan).
  - Do groups for rituals so they can work under a deadline.
- Teaches you to work under stress:
  - Prepare a challenging fundraiser and see it through to the end.
  - Have an interview workshop to prepare you better for tough interviews.
- Develop leadership skills:
  - Encourage participation in school/campus activities outside of the chapter.
  - Encourage new members to get involved in committees and/or leadership roles.
  - Develop a peer mentor program within your group for leadership roles.
o Invite school/community/business leaders into the chapter to share their experiences.

• Instill a sense of membership:
  o Start new traditions ~ it only takes a few academic terms for it to become a tradition.

Believe it or not:
Chapters found responsible of hazing have been required to eliminate hazing in order to stay open as a chapter of Alpha Kappa Psi. These chapters report that eliminating hazing increased member involvement therefore reducing apathy!

Parliamentary Procedure
Basic Principle: Minority is heard but majority rules

I. Establish a quorum
   A quorum is the number of people who must be present to take legal action on business matters and is essential to conducting business meetings. The quorum is stipulated in the bylaws, and before any business is discussed, the chair should establish for the record that a quorum exists.

II. All members have equal rights
   These include the right to make motions, debate, and vote. You need a two-thirds majority vote to deprive members of basic rights — such as closing or limiting debate and closing nominations. No member may be forced to vote, silence gives consent. General business — majority of those present

III. Debate, decorum, and order
   Only one main motion (one subject) may be considered at a time, and only one person may speak at a time. Anyone who wishes to make a motion should first be recognized by the chair and preface the motion with the words, “I move that.” If someone wishes to second the motion, that person does not have to wait to be recognized but merely calls out, “I second the motion.” Without a second motion, the chair moves on to the next agenda item. After the motion has been made and seconded, the chair restates the motion, which is termed a main motion. Discussion begins. To ensure order and that only one person speaks at a time, the chair recognizes members before they may speak. There must be an opportunity for at least one pro and one con for each motion and amendment. Technically, after a second is made, a motion cannot be withdrawn (not efficient to enforce).

IV. Amendments
   The purpose of an amendment is to change a motion already under consideration. If a member believes the right topic is being discussed but wants to modify the wording of the motion, he or she calls for an amendment. Technically, a motion may be amended, and the amendment to the motion may be amended, but no further amendments may be made. Amendments are motions, and as such, they require a second and full debate. Amendments can slightly change the main motion. Typically, if the author of the original motion agrees with the amendment it can be accepted as a “Friendly Amendment” and incorporated into the original motion without the need for debate or a vote.

V. Closing Debate
   A member who wishes to end debate may interrupt discussion and say “I move/call the previous question.” This motion requires a second and must receive a two-thirds majority vote. Should it receive a two-thirds majority, the chair then states, “The previous question has been called, all those in favor of the motion to...”

VI. How to Run a Meeting
   A. Decide how strict to be with parliamentary procedure — generally, the larger the group, the more strict you should be.
B. How will one be recognized to speak? — typically by raising your hand then being called upon by the chair. Large assemblies may have fixed microphones where lines are formed to speak.

C. Chair controls flow of meeting.
   i. Must appear unbiased, can never state an opinion on the motion before or during debate.
   ii. To be effective, must control flow of meeting by:
      iii. Quickly and decisively granting permission to speak.
      iv. Always watching that comments are being made at the appropriate times (a pro should be a pro, not a public service announcement; points of information should be questions not pros/cons). Always stop someone and ask him or her to explain his/her point if it sounds like the granted time is being appropriately used (if it sounds like someone is making a con during a point of information).
      v. Quickly and decisively making judgments on points of order.
      vi. Prompt for actions if meeting slows down (chair will entertain motion to _____ — such as close debate, open a window, consider "X").
      vii. Don’t be afraid to take a recess if you need to clarify points or get some information.
      viii. Be quick to keep people in order (not speaking out of turn).
      ix. Don’t let debate get personal — name-calling is not allowed (try to get people to speak in the third person when referring to other people in the room and to address actions not people).

D. Use other resources — Warden, Parliamentarian, etc.

VII. Efficiency Tips
   A. Most motions can be voted on by acclamation (general consent).
   B. Use voice vote for motions. Chair’s ruling stands on results of voice vote unless “call for division” is called for, then vote count is needed.
   C. Chair cannot make motions but can offer to “entertain” a motion which may fix a particular sticking point in debate.
   D. If chair doesn’t know the answer to a “point of information,” he or she can call on someone else to answer it.

VIII. Potential Problems
   A. Noisy individual — warning from chair then warden removes.
   B. Bad environment (hot, cold) — chair can recess meeting to try remedy the situation.
   C. People speaking without being recognized — reminder from chair to wait to be recognized, if it doesn’t work, warning from chair then warden removes.
   D. Debate lasting too long — “without objection, chair ends debate after two or more pro/cons.” (Two of the same back-to-back.)
   E. Meeting lasting too long — “without objection, chair rearranges agenda and will postpone consideration of certain items until next meeting.”
   F. Everyone wants to speak — in the order they raise their hands, a list is made, chair simply calls names off this list.

“Entrepreneur Larry Wilson defined the difference between passion and drive as the difference between expressing yourself and proving yourself.” — On Becoming a Leader By Warren G. Bennis

Adopted from Parliamentary Procedure: A Few Rules Help Keeps Order, by Kathy Gill"
### Parliamentary Procedure at a Glance

Here are some motions you might make, how to make them, and what to expect of the rules.

<table>
<thead>
<tr>
<th>To Do This:</th>
<th>You Say This:</th>
<th>May you interrupt the speaker?</th>
<th>Do you need a second?</th>
<th>Is it debatable?</th>
<th>Can it be amended?</th>
<th>What vote is needed?</th>
<th>Can it be reconsidered?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADJOURN MEETING</td>
<td>“I move that we adjourn”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>CALL AN INTERMISSION</td>
<td>“I move that we recess for...”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>COMPLAIN ABOUT HEAT, NOISE ETC.</td>
<td>“I rise to a question of privilege”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No</td>
</tr>
<tr>
<td>TEMPORARILY SUSPEND CONSIDERATION OF AN ISSUE</td>
<td>“I move to table the motion”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>I CALL QUESTION END DEBATE AND AMENDMENTS</td>
<td>“I move the previous question”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>POSTPONE DISCUSSION FOR A CERTAIN TIME</td>
<td>“I move to postpone the discussion until...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>GIVE CLOSER STUDY OF SOMETHING</td>
<td>“I move to refer the matter to committee”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>AMEND MOTION</td>
<td>“I move to amend the motion by...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>INTRODUCE BUSINESS</td>
<td>“I move that...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**THE MOTIONS LISTED ABOVE ARE IN ORDER OF PRECEDENCE... BELOW THERE IS NO ORDER...**

<table>
<thead>
<tr>
<th>PROTEST BREACH OF RULES OF CONDUCT</th>
<th>“I rise to a point of order.”</th>
<th>Yes</th>
<th>No</th>
<th>No</th>
<th>No</th>
<th>No Vote</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>VOTE ON A RULING OF THE CHAIR</td>
<td>“I appeal from the chair’s decision”</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>SUSPEND RULES TEMPORARILY</td>
<td>“I move to suspend the rules so that...”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>AVOID CONSIDERING AN IMPROPER MATTER</td>
<td>“I object to consideration of this motion”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>VERIFY A VOICE VOTE BY HAVING MEMBERS STAND</td>
<td>“I call for a division” or “Division!”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No</td>
</tr>
<tr>
<td>REQUEST INFORMATION</td>
<td>“Point of information.”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No</td>
</tr>
<tr>
<td>TAKE UP A MATTER PREVIOUSLY TABLED</td>
<td>“I move to take from the table...”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>RECONSIDER A HASTY ACTION</td>
<td>“I move to reconsider the vote on...”</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
</tbody>
</table>

**NOTES:**

1. Unless vote on question is not yet taken.
2. Unless the committee has already taken up the subject.
3. Only if the motion to be amended is debatable.
4. Except in doubtful cases.
5. A majority vote in negative needed to prevent consideration of main motions.
6. 2/3 vote in negative needed to prevent reconsideration of main motion.
7. Only if the main question or motion was not, in fact, considered.
8. Only if motion to be reconsidered is clearly debatable.
As secretary, it is important you are informed of all chapter activities and functions. You are responsible for the distribution of information about your chapter. The following actions will ensure your term starts off on the right foot:

- Attend the weekly executive board meeting and take minutes. You are responsible for minutes of all executive board meetings.
  - Type and file all meeting minutes in an organized, complete manner.
  - Keep minutes on permanent file.
  - Submit minutes to chapter advisor and regional director.
- Call the roll at each chapter meeting.
- Know % in attendance and number required for votes.
- Keep track of attendance & report fines due to chapter.
- Ensure all motions are in written form when presented at chapter meetings. The motions passed at meetings are valid until repealed. These motions, in addition to your bylaws, determine chapter policies and procedures.
- Send cards, notes, and other forms of correspondence to other chapters and volunteers.
- Maintain the chapter membership record book. This is a vital part of the chapter’s history.
- Create a scrapbook to preserve chapter history (or this can be done by a historian).
- Keep the archives up-to-date. This should include pictures of events, alumni, petitions for awards, and information on the founders of the chapter.
- Create a bulletin board for all chapter communications. Not all members will be able to attend meetings and word-of-mouth does not always work to communicate important information.
- Manage chapter's e-mail distribution list.

**Official Duties**

- Shall keep accurate and complete minutes of all meetings of the chapter.
- Shall be the custodian of all records, files and documents of the chapter, except the financial books of account.
- Shall be responsible for the general correspondence of the chapter.
- Create and maintain phone lists and calendars.
- Create a phone tree system for emergency contact.
- Work with the treasurer to update chapter roster.
- Shall keep a record of all proposals for membership.
- Shall keep a separate record of all pledges, initiations, election of any chapter officers, suspensions, resignations and deaths within the chapter and shall send duplicates of such records within seven (7) days to the appropriate RMT member(s), MT member(s) and Heritage Center.
- Report all new chapter officers online at www.akpsi.org.
- Shall have further powers and duties as may be prescribed by the laws of the fraternity.

**Tips for communicating with the Regional Management Team**

The following is a list of tips used to establish a standardized form of communications between you and the Regional Management Team.

- Minutes should be typed and the font should be in an easy-to-read typeface such as Times, Arial or Courier, in font sizes of 10-11.
- Use the Meeting Minutes Template found online at www.akpsi.org for a standardized form to record your meeting minutes.
- The following information is required in all the minutes:
• Minutes should be submitted to your CA, SD and RD within seven days of the meeting. This will allow them to be reviewed and, if there is a problem or a question, the chapter can be contacted prior to the next meeting.

• The email should be clearly labeled in the “subject” and the file (attachment) should be exactly the same. It should include the chapter, number, type of minutes, and the date of the meeting. Example: “Omega Omega, Chapter Meeting #6, 01-01-05.” Please DO NOT use “AKPsi!” Be consistent in how you name the files/emails. Send all minutes to your CA, SD and RD.

• The president or another Executive Board member should approve the minutes.
  o You should always include your name, email address, and phone number in each document as well as those of the Executive Board member who approved the minutes.

• Any correspondence send to the Heritage Center should be copied to your CA, SD and RD. This includes copies of any checks you mail or officer notifications, etc.

---

**Sample Minutes**

**MINUTES OF ALPHA KAPPA PSI**

<table>
<thead>
<tr>
<th>Number</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number Consecutively</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DATE</th>
<th>08/13/2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpha Alpha</td>
<td>CHAPTER</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Recorded By</th>
<th>Upsilon Omega</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of School</td>
<td>University of US</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Officer Name</th>
<th>President's Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul Peterson</td>
<td>312-555-1212</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ATTENDANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Officers</td>
</tr>
<tr>
<td>Members</td>
</tr>
<tr>
<td>Alumni</td>
</tr>
<tr>
<td>Faculty</td>
</tr>
<tr>
<td>TOTAL</td>
</tr>
</tbody>
</table>

**Annual Chapter Report**

<table>
<thead>
<tr>
<th>Year to Date</th>
<th>Forecast</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge Bouns</td>
<td>200</td>
<td>0</td>
</tr>
<tr>
<td>Exclenthood Bouns</td>
<td>1000</td>
<td>0</td>
</tr>
<tr>
<td>Integrity</td>
<td>200</td>
<td>0</td>
</tr>
<tr>
<td>Integrity Bouns</td>
<td>200</td>
<td>0</td>
</tr>
<tr>
<td>Service Bouns</td>
<td>1000</td>
<td>0</td>
</tr>
<tr>
<td>Unity</td>
<td>1000</td>
<td>2000</td>
</tr>
</tbody>
</table>

**Unity Bouns**

<table>
<thead>
<tr>
<th>TOTAL Points</th>
<th>106500</th>
</tr>
</thead>
</table>

**Treasurer’s Report**

<table>
<thead>
<tr>
<th>Year to Year</th>
<th>Year To Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking Account</td>
<td>5900</td>
</tr>
<tr>
<td>Savings Account</td>
<td>250</td>
</tr>
<tr>
<td>Accounts Receivable (due Months Due)</td>
<td>150</td>
</tr>
<tr>
<td>Accounts Payable (due Months Due)</td>
<td>0</td>
</tr>
<tr>
<td>Travel Fund (Car expense, Kena, etc)</td>
<td>15</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

**Membership Information**

<table>
<thead>
<tr>
<th>Current Number of Pledges</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Pledges Inducted</td>
<td>0</td>
</tr>
<tr>
<td>Initiation Date for Current Academic Term</td>
<td>11/15/05</td>
</tr>
<tr>
<td>Number of Graduating Seniors This Term</td>
<td>10</td>
</tr>
</tbody>
</table>
2. **Roll call**:
    Absent: *Karin George, Carry Miller and Paul Dugenoux.*
    Alumni Present: *SD Jane Doe*

3. **Special Presentation**:
    Recruitment Clinic: Daniel Donaldson and Samuel Ducon went over some tips for a successful Spring 2006 recruitment and voting procedures concerning potential pledges.

4. **Officer Reports**:
   a) **President**:
       Daniel Mangetout announced that there is no food or drink allowed in meetings. He also reminded everyone of the correct procedure to follow when arriving late or leaving early. He announced the first meeting of next semester would be held on January 4.
   b) **Executive Vice President**:
       Sami Horin reminded everybody that composite pictures would be taken on Tuesday, February 2 from 8:30 PM - 10:00 PM. The location will be posted in the display case.
   c) **Vice President of Membership**:
       Gregory Simon announced that the Pledge educators for next semester were Lisa Kelly, Jeffrey Crows, Jennifer Parrish and Robert Kado. The Recruitment Committee head will be Amelia Krouse. Each brother will be required to spend at least two hours at the recruitment table during the first three weeks of classes and there should be three or four brothers there at a time.
   d) **Vice President of Chapter Activities**:
       Michelle Harnass reported that the first community service opportunity for next semester would be a park clean-up held on January 4 and 5 at the Malborough River State Park from 8:30 AM - 12:30 PM.
   e) **Secretary**:
       Sandra Barjo announced the committee heads for next semester. She also handed out the calendars and the recruitment dates for next semester. Sandra also requested that the brothers show her their SASS reports or report card with their new GPA before the second meeting.
   f) **M.O.R.**:
       John Negit said that the Judicial Review Board would meet briefly after the chapter meeting to go over the different appeals for fines.
   g) **Treasurer**:
       Carmen Castaphiore announced the fines for the past couple of weeks. He then presented the budget for 1998. Maurine Ducul moved to accept the budget, as it was presented -- motion passed.

5. **Committee Reports**
   a) **Bylaws Committee**:
       Sandra Barjo moved to increase pledge dues to $175.00 -- motion tabled until next meeting
   b) **Membership Committee**:
       Amelia Krouse announced that the Recruitment Committee would be meeting after chapter.
   c) **Community Service Committee**:
       Sami Horin passed around the sign up sheet for the Malborough River State Park clean up.
   d) **Athletic Committee**:
       Jeremy Kapita needs the social security numbers of all the brothers by the next meeting for intramurals.

6. **Old Business**
   None

7. **New Business**
a) Sidney Haricot made a motion to move chapter meetings from 7:00 PM to 6:00 PM on Sundays. The motion was not carried. (This was not a Bylaw change – Bylaw allows changes for one semester)
b) Sandra Barjo presented a list of the many committee positions that still needed to be filled for next semester and people volunteered to be on those committees.
c) Motion Made to Amend Article X Section D Paragraph 3 from “...the fine for missing chapter will be $10 for the third missed meeting, $20 dollars for the next and double for each meeting thereafter...” to read as follows: “...each brother shall be allowed two absences from chapter meetings per semester (there shall be no excused or unexcused) Beginning with the third absence, Brothers shall be assessed a fine of $15 for missing chapter and double for each chapter missed thereafter ($30 for the fourth, $60 for the fifth, $120 for the sixth and so on)...” The Parliamentarian explained that there are only 10 meetings per semester and the intent of this motion was to severely penalize a brother who misses over half the meetings. Additionally, the elimination of excused and unexcused absences will allow the E board and Judicial Board to concentrate on more important operational priorities rather than bickering on weather a reason for missing chapter is excused or not. Remember your thirteen duties of a brother? ...To attend all meetings...!

8. Announcements
   a) Daniel Mangetout and Carmen Castaphiore presented information about the Success Institute that will take place in Jacksonville on February 27 through March 1. We had a great time in Atlanta! It is a great opportunity to meet brothers from other chapters, make new friends and a learning experience. This will be fun so sign up NOW!! Daniel suggested that any questions be forwarded to the Executive Board or himself.
   b) Sandra Barjo announced that there would be a costume party at Wendell Maparole’s house on Friday at 9:00 PM.

9. Pass the gavel:
   a) Maurine Ducul made a motion to adjourn.

10. Adjournment
**Frequently Asked Questions**

**What due dates do I need to know?**
The most accurate and up-to-date due dates for your chapter are listed on [www.akpsi.org](http://www.akpsi.org). Check out the Calendar of Chapter Due Dates for the most up-to-date calendar planning.

**When are the chapter minutes due?**
Within seven days of your meetings. The Executive and Chapter Minutes are to be sent to the CA, SD and RD. All minutes should be sent to chapter members with 24 hours of the meeting.

**What if the chapter roster is inaccurate?**
Correct it immediately by logging into the chapter reporting tools at [https://www.akpsi.org/cmt](https://www.akpsi.org/cmt). Remember your dues and insurance billings are based on your roster.

**Can first-year students pledge?**
There is not a minimum GPA to pledge Alpha Kappa Psi, therefore freshman can pledge. Refer to the [Statutory Code](http://www.akpsi.org/cmt) (Caput II Section 6) for more information.

**Is there an inactive status?**
No, circumstances such as internships, co-op, student abroad, military duty or medical/extreme hardship are considered for Leave of Absence status. Special exceptions have been made for those who are extremely ill, pregnant, etc., but approval is required by your RD. These members must be reported as Leave of Absence and they are to re-affiliate (and be reported as doing so) upon their return. There are NO “social memberships,” “senior status,” etc. Leave of Absence status is different than suspension due to attendance issues and/or financial delinquency.

**How can a member be removed in good standing?**
Only by leaving the university; this could be because they “drop out” of school, graduate with the degree in which they pledged (even if they stay on for grad school), transfer to another school or branch of your school (more than 50 miles).

**Are there any circumstances when the brother must re-affiliate?**
Yes, if the brother returns to the university at which their home chapter is located to complete the degree in which they pledged. (Examples of this would include conclusion of internships, co-op, and medical leave of absence.)

**What are the different membership forms?**
Chapter rosters can be updated online using the Chapter Management Tools at [http://www.akpsi.org/cmt](http://www.akpsi.org/cmt). Once you update your roster online, an e-mail is automatically sent to you confirming these changes have been requested. A second email will be sent once the changes are approved by the Heritage Center. Any officer currently reported to the Heritage Center can access the Chapter Management Tools.

- **Report Pledges** – Reporting of all new pledges. Information required: Full name, address, phone, e-mail address, date of birth, expected graduation year, induction date and expected initiation date. Download the [Pledge Information Collection Form](http://www.akpsi.org/cmt) and have the pledges fill one out for easier input into the website. Due within seven business days of induction.

- **Report Initiates** - Reports your new brothers. Due within seven business days of initiation.
• **Chapter Roster Management** – Report status changes (graduating seniors, suspended brothers, leave of absences) and officer changes (incoming and outgoing officers; must be one of seven positions found in the *Constitution*; President, VP of Membership, VP of Admin, VP of Alumni Relations, Treasurer, Secretary, and MOR). A reason must be given for each suspension and Leave of Absence.

• **Member Reinstatement Form** – Reports brothers reinstated from temporary removal; also used to report affiliation of a brother who transfers from one university to another and joins the chapter.

**Can a brother resign from the fraternity?**
The membership of a member of the fraternity shall terminate upon the receipt of the member’s written resignation by the CEO of the fraternity or upon the member’s death. Any resignation does not relieve the member of any obligation incurred or commitments made before the resignation. (*Constitution, Article II, Section 8D*). Chapters cannot resign their members, members can only resign themselves.

A brother who resigns cannot attend any fraternity meetings, rituals or events and should not refer to his or her former membership or fraternity experiences in any document, such as résumés, employment applications, or job interviews.

**Can a chapter purchase alcohol?**
It cannot! See the risk management policies in the *Board of Directors Statement of Policy*.

**What is the chapter’s fiscal year?**
Per the *Constitution and Statutory Code* each chapter shall follow the fiscal year of April 1 – March 31. NO EXCEPTIONS.

**What is an audit and when should it be done?**
It is a review of all income and expenses and serves to ensure to the chapter, the outgoing treasurer and the incoming treasurer all funds have all been properly accounted for and any questions are resolved in a timely fashion. It should be done at the end of the treasurer’s term by the audit committee, should not include the treasurer and preferably will include at least one faculty/alumnus/CPA. A copy of the chapter audit is due to the Heritage Center by May 31 of each year after the conclusion of the chapter fiscal year (March 31). Chapters are encouraged to reference the *Chapter Audit Manual* for assistance.

**What are officer evaluations and when should they be done?**
Officer evaluations are an opportunity for the brothers to give the officers of the chapter feedback and constructive criticism on themselves in several categories. Some chapters do this once an academic term (after the first third of the term); others do it twice an academic term (at the 1/3 point and at the 2/3 point). It should be stressed that this is not personal and should be used as an anonymous way to help each officer grow and develop on a professional level. A sample officer evaluation can be found in the *Road to Brotherhood*.

**What is an incident report and when do I send one?**
An incident report is filled out whenever a negative event occurs, especially one which could result in legal issues, whether a lawsuit or police or judicial action. Examples are anytime the “authorities” (police, ambulance, univ. etc.) are involved. Even if you think it will “go away,” you should document it! Always consult with the RMT if there is even a question. When in doubt write it out! Incident forms can be found online in the *Insurance and Claims Manual*.

**How do I know who to send copies to?**
Anything sent to the Heritage Center should be copied to the RMT. Most items will be sent to CA, SD and RD.

**What is a Judicial Review Board?**
The purpose of the Judicial Review Board is to create a mechanism by which effective and efficient disciplinary action may be taken against brothers or pledges of the chapter in a timely fashion. This provision is not intended and shall not, at any time, circumvent any of the rights and privileges granted to the same by the Bylaws, the *Constitution and Statutory Code* or the *Board of Directors Statement of Policy* of Alpha Kappa Psi.

**MISSION:** The Judicial Review Board may review any action by, of, or between pledge(s), brother(s), and their guest(s) (for those actions they will be held accountable) which may be considered inappropriate behavior, detrimental to the reputation of Alpha Kappa Psi and this chapter, or endangers the continuous smooth operations of this chapter. The Judicial Review Board ensures that a complete and thorough investigation is conducted, establishing the validity of the charges, and, if valid, the guilt or innocence of the accused and establishing an equitable punishment in the case of the former.

The Judicial Review Board is a formal remedy for serious or severe grievances against members of Alpha Kappa Psi. Any personal or minor problems can usually be settled through more informal channels. The Judicial Review Board is also responsible for hearing appeals by members who have been fined for any reason. The Judicial Review Board is encouraged to contact the Fraternity Judiciary Committee with any questions or uncertainties.

The Judicial Review Board should not need to be utilized more than a few times an academic term. If the Judicial Review Board is being utilized too frequently this is an indication of deeper problems within the chapter and the Judiciary Committee should be consulted.

Anytime the Judicial Review Board conducts an investigation it is to fill out an Investigation Report Form found online and submit it to the Judiciary Committee. Anytime an investigation is due to an alleged violation of a risk management policy (hazing, alcohol or sexual harassment) the chapter must forward this information onto the Judiciary Committee for final review and ruling.

For more information on Judicial Review Boards, see the *Judiciary Committee Operations Manual* found online at [www.akpsi.org](http://www.akpsi.org).

**Where can I go to get additional education?**
Additional education is available through webinars and eLearnings on [www.akpsi.org](http://www.akpsi.org). They offer an opportunity to supplement your programming schedule with topics that are more difficult to find locally. The webinar schedule and topics change each academic year. For the most current schedule and to register go to [https://www.akpsi.org/webinars](https://www.akpsi.org/webinars).

All webinars are recorded and placed in the webinar library which you can access at any time here. Simply go to [www.akpis.org/webrecordings](http://www.akpis.org/webrecordings) to find a topic!

All eLearning programs can be found here: [www.akpsi.org/elearning](http://www.akpsi.org/elearning).
Here are some common words and abbreviations used in Alpha Kappa Psi:

- **ACR: Annual Chapter Report**: chapter operations reporting tool
- **AVP: Area Vice President**: Leads an Area of AKPsi
- **BOD: Board of Directors**: group within fraternity responsible for setting policy and fraternity direction
- **BoDSoP: Board of Directors Statement of Policy**
- **CA: Chapter advisor**: An alumnus member who guides a chapter
- **CAB: Chapter Advisory Board**: smaller time commitment positions in specialty areas (recruitment, finance, etc.), under the direction of a chapter advisor and assist one specific chapter
- **CoL: College of Leadership**: held jointly with Convention
- **EVP: Executive Vice President**: assists the president
- **FA: Faculty advisor**: faculty member that guides a chapter
- **HC: Heritage Center**: central office for the fraternity, foundation and paid staff members
- **Induction**: Ceremony to become a pledge
- **Initiation**: Ceremony to become a brother
- **JC: Judiciary Committee**: reviews issues as related to the risk management policies on behalf of the fraternity
- **JRB: Judicial Review Board**: reviews membership issues within a chapter as pertains to rules and regulations
- **MT – Management Team**: consists of the president, executive vice president and 13 regional directors
- **OT: Officer Training**
- **PBLI: Principled Business Leadership Institute**
- **PEP: Pledge Education Program**: The only approved pledge program of the fraternity
- **RD: Regional Director**: oversees the chapters and volunteers within their region
- **RMT: Regional Management Team**: consists of CAs, FAs, SDs, regional managers and RD
- **RTB — Road to Brotherhood**: comprehensive membership program following the lifecycle of a brother from recruit to alumni
- **SD: Section Director**: oversees chapters within a portion of a region
- **YRS: Yellow Rose Society**: student giving program sponsored by the Alpha Kappa Psi Foundation
If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.

John Quincy Adams
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The Alpha Kappa Psi Vision, Core Values and Guiding Principles should be the foundation for any chapter activity. As an officer it is important to educate other members about their significance. Let these guide you and be the foundation of decisions and discussions.

**Vision**
Alpha Kappa Psi is recognized as the premier developer of principled business leaders.

**Core Values**

**Brotherhood** | Trust, respect, cooperation, companionship and aid to brothers is the expected norm

**Knowledge** | Education and experience is emphasized and shared

**Integrity** | All actions, whether in business or in life, are guided by honesty, ethics and fairness

**Service** | Sharing of time, talent and treasure with society and our fraternity is a priority

**Unity** | A common understanding of our vision and values that transcends chapter, generation and profession is utilized to anticipate and create the future

**Tagline**
Alpha Kappa Psi — Shaping People, Shaping Business

**Guiding Principles**

**Building Brotherhood** | The esoteric quality we call "Brotherhood" is of vital importance though difficult to define. Our members, from the day they become brothers until the end of their lives, foster a great love of the fraternity and a fondness for brother members. While brotherhood manifests itself in a multitude of ways, at its center is a sense of duty and respect for both the fraternity and individual members. All activities and decisions that involve the fraternity are guided by a sense of stewardship and selflessness. Members are anchored by the need to do what is in the best interest of the fraternity as a whole and are not swayed by individual self-interest.

**Lifelong Learning** | College is merely the beginning of business education. Our members share their knowledge and experiences openly with the people they work with, regardless of rank or position. In addition, they seek out opportunities to share their real-world experience with brother members, and in doing so they enhance the lifelong learning of those members.

**High Ethical Standards** | While the business world offers many opportunities for success and advancement, it also requires us to make decisions about how we succeed. Our members understand the importance of making decisions and conducting business in a way that takes into account both legal and ethical considerations. Our members serve as role models through their consistently fair and ethical conduct.

**Improving Communities** | Much is expected of those to whom much is given. Business professionals who seek to improve the communities in which they do business improve lives and develop goodwill. Our members actively give back to their communities through volunteer activities and monetary support.

**Enhancing the Fraternity for Life** | College chapters serve as living laboratories for classroom concepts and professional conduct. In turn, lessons learned in the fraternity prepare members for success in the business world. Because they recognize the value and importance of our Fraternity, our members are united in their
passion to build a legacy for the future. They support the fraternity through volunteer leadership and monetary gifts.

Heritage Center Staff

Alpha Kappa Psi | 7801 E 88th Street :: Indianapolis, IN 46256-1233
Phone Number: (317) 872-1553 :: Fax Number: (317) 872-1567
www.akpsi.org/staff

Where do I get help? Always start with the www.akpsi.org website. Several standard questions can be found there. If the question needs to be elevated to the next level, check with your chapter advisor, section director or regional director. If they are unable to help, they will direct you properly.

Chief Executive Officer | Steve Hartman, CAE
Ext 101
Contact Steve at about:
- Operations, Fraternity & Foundation
- Staff Concerns
- Strategic Planning

Managing Director of Alumni Services and Chief Operating Officer, Alpha Kappa Psi Foundation | Jess C. LaNore, CAE, Purdue ’00-Honorary/Life
Ext 109
Contact Jess about:
- Academic Team
- Foundation Contributions
- Licensing/Trademarks
- Major Giving
- Merchandising Programs
- Planned Giving
- Scholarships
- The Diary

Managing Director of Operations | Brian D. Parker, CAE, Indiana ’93-Life
Ext 105
Contact Brian about:
- Expense Reimbursement
- Financial Statements, Fraternity & Foundation
- Liability Insurance
- MAPP
- Risk Management

Managing Director of Student Services | Jessica R. Seitz, CAE, Auburn ’02-Honorary/Life
Ext 103
Contact Jessica about:
- Academy
- Case Competition
- Certified Fraternity Volunteer (CFV)
- Chapter Advisory Board (CAB)
- Convention
- Meeting Planning
- PBLI
- Volunteer Services
Director of Communication | Jennifer L. Adamany, San Diego '05-Life
Ext 106
Contact Jennifer about:
  • Branding
  • Communication Technology
  • Marketing
  • Media Relations
  • Publications
  • Website

Director of Communication and Information Services | Christopher W Pye, Shippensburg ‘04-Life
Ext 119
Contact Chris about:
  • Career Center (online)
  • Marketing
  • Project Reconnect
  • Surveys (online)
  • Technology
  • Website

Director of Alumni Development | Jeffery D. Hughes, South Florida ‘00-Life
Ext 108
Contact Jeff about:
  • Affinity/Royalty
  • Alumni Association
  • Alumni Awards
  • Alumni Chapter Information
  • Alumni Development
  • Alumni Chapter Expansion
  • Alumni Listings
  • Chairman’s Advisory Council
  • Life Loyal Program

Director of Education | Jason R. Pierce
Ext 102
Contact Jason about:
  • College of Leadership
  • Educational Programming
  • eLearning
  • Event Speakers
  • Officer Training
  • Pledge Education Program
  • RMT Training
  • Road to Brotherhood
  • Webinars

Administrative Assistance for Chapter Services | Melinda Rosenthal
Ext 116
Contact Melinda about:
  • Annual Chapter Report
  • Chapter Services
  • Community Service
  • Dean’s Council
  • Recruitment
  • Show Cause
  • Student Awards
  • Student Chapter Expansion
Chapter Educational Resource Coordinators

- Area 1: Evie Eddins, Florida State ’13 (Ext 117)
- Area 2: Cady E. Tabeling, Southern Indiana ’11-Life (Ext 113)
- Area 3: Kortney Petry, Ball State ’11 (Ext 117)
- Area 4: Liz Vickers, Stetson University ’11 (Ext 114)

- Annual Chapter Report Performance
- Chapter Event Planning
- Chapter Health Plans
- Membership and Officer Reporting
- Membership Concerns
- Recruitment
- Retention
- Risk Management Probation
- Show Cause Probation

Member Service Representatives

The Member Service Representatives are the "Voices of the Heritage Center." They are the customer service representatives who handle many day-to-day activities at the Heritage Center. The Member Service Reps can answer many of the general requests you may have.

Member Services | Debby Orff
Ext 110
Contact Debby about:
- Address changes
- Charters
- E-Mail Addresses
- Initiate Certificates
- Member Processing

AKPsi Marketplace/Foundation | Hazel Collier
Ext 111
Contact Hazel about:
- Address changes
- Jewelry Orders
- Merchandise Orders
- Officer Updates

Finances and Collections | Cathy Cole
Ext 112
Contact Cathy about:
- Address changes
- Chapter Account Information
- Chapter Collection Problems
- Invoice and Statement Processing

Administrative Assistance/Event Registration Services | Judy Pawlus
Ext 104
Contact Judy about:
- Address changes
- Event registrations
- Scholarship applications
Volunteer Fraternity Leadership

Fraternity Board of Directors (BOD)
The fraternity’s board of directors is composed of nine alumni members elected by the Chapter Congress for terms of three years. The board in turn elects its officers who are the chairman, vice chairman, treasurer and secretary. The responsibility of the board of directors is to set policies and procedures that will guide the fraternity into the future. It acts as the supreme governing body of the fraternity between meetings of the Chapter Congress. It is charged with approving the fraternity budget, setting annual goals of the fraternity, overseeing the performance of the CEO and, most importantly, strategic planning. In strategic planning, the board takes input from members through a variety of sources and determines the fraternity’s core values, its vision for the future, or in laymen terms — what does Alpha Kappa Psi want to be known for? Further, it is charged with the responsibility of measuring how programs assist chapters and members to reach the vision. The board is the “big picture” strategic thinker of the organization much like the board of a corporation. The chairman of the board is the highest ranking volunteer in the fraternity.

Management Team (MT)
The Management Team is the volunteer operational arm of the organization. It is composed of the fraternity president, executive vice president, four area vice presidents and 16 regional directors. The Management Team is charged with the responsibility of servicing the chapters of the fraternity within the guidelines of policies and procedures set forth by the board of directors. The Management Team also manages a vast number of fraternity alumni volunteers, such as regional managers, section directors, chapter advisors, and chapter advisory board. The fraternity president serves as the chairman of the Management Team, presides over meetings of the Chapter Congress and appoints operational committees. For a current list of officers and regional directors visit www.akpsi.org/mt.

- The President and Executive Vice President administer the important work of appointing, charging and monitoring committees; overseeing implementation of budgets, resource materials, and educational programs approved by the Board of Directors. The president may appoint a cabinet of volunteers for assistance (as approved by the Board of Directors).
- The Area Vice President is tasked with the administrative oversight of specific Regions/Regional Directors and for executing the tactical direction of Fraternity operations based on strategic guidance from the Board of Directors (BOD) while partnering with the Fraternity Staff
- The Regional Directors are responsible for leading and supervising their regions. They appoint regional management team members, run their regional officer training, attend conventions, and do other things that make the regional director position the undisputed toughest volunteer position in the fraternity.

Foundation Board of Directors
The Alpha Kappa Psi Foundation, founded in 1951, is a not-for-profit 501(c)(3) organization dedicated to promoting the ideals of AKPsi. Its mission is: providing resources for enhancing the educational experience of future business leaders. The governing body of the foundation is its board of directors. It is charged with the responsibility of setting polices, fundraising goals and plans, an operational budget, and the overall vision of the foundation. A professional staff oversees day-to-day activities. The foundation funds the Academy, All-AKPsi Academic Team, Case Competition award scholarships and numerous scholarships. So the fraternity can have quality speakers at its events (such as the Principled Business Leadership Institute or the College of Leadership), the foundation also underwrites expenses for many speakers through its Principled Business Leadership Fund.
**Foundation Scholarships**

Academy, Late June (all expenses paid):
The Academy is like no other Alpha Kappa Psi educational experience. It is an intimate, hands-on, challenging leadership development retreat. It is a unique program designed especially for those who demonstrate exceptional qualities for future business leaders. A limited registration cap and a remote location ensure that the experience is highly interactive. Through the generous support of Alpha Kappa Psi alumni, friends and Corporate America, the AKPsi Foundation pays all expenses for those attending the four-day experience.

**Application deadline: Spring**

**All-AKPsi Academic Team:**
The All-AKPsi Academic Team recognizes students who maintain excellence in academic standing while making positive contributions to their campus and community. The selection process measures an applicant's ability to balance the pursuit of a degree with the development of leadership skills, interactive extracurricular participation, and a sense of social responsibility. From among the team members, one or more outstanding individuals receive the Top Scholar Award and are recognized with educational grants.

**Application deadline: Fall**

**Scholarships:**
There are more than 30 scholarships available to Alpha Kappa Psi members. Some of these scholarships may have certain requirements. Visit akpsi.org for a current listing of chapter and Fraternity-wide scholarships.

**Case Competition:**
Through the foundation’s Case Competition, students are introduced to the realities of decision making – including incomplete information, time constraints and conflicting goals – giving them first-hand experience in analyzing business situations. The competition was designed to stimulate students’ thinking by challenging their capabilities and preparing them for future managerial decision making.

**Leadership**

“Leadership is the art of mobilizing others to want to struggle for shared aspirations.”  
– The Student Leadership Challenge by Jim Kouzes and Barry Posner

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<th>What do we expect from leaders?</th>
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"I learned that a great leader is a man who has the ability to get other people to do what they don't want to do and like it."  -Harry Truman
Characteristics of a Leader
Are you a leader? Here is a brief list of leadership characteristics:

- Leaders are good teachers and great communicators.
- Leaders have stamina.
- Leaders do what they know is right, rather than what is popular.
- Leaders are good at managing time.
- Leaders do not condone incompetence, they replace it.
- Leaders are reliable and open-minded.
- Leaders are good listeners.
- Leaders act with integrity.
- Leaders inspire a vision.

- Leaders are trustworthy and able to trust others.
- Leaders subordinate their egos to the goals of the chapter.
- Leaders know how to run meetings.
- Leaders teach all members the basics of chapter operations.
- Leaders help establish realistic goals and set action plans for reaching these goals.
- Leaders successfully motivate members on the importance of reaching goals.
- Leaders recruit competent people.

Spotting Leadership Potential*

1. Future leaders show initiative and can resolve issues with minimal supervision instead of waiting around for constant direction.
2. Future leaders trust their own judgment and get on with the task at hand, taking responsibility and without fear of making mistakes.
3. Future leaders are thirsty for knowledge and seek mentors and role models as they understand there is much to learn.
4. Future leaders share their knowledge, recognizing that the more they give the more they receive in return. Knowledge hoarders do not make good leaders.
5. Future leaders accept they are not perfect and do not know everything, that they have limitations and do not know and cannot do it all. They are not afraid to show weakness.
6. Future leaders accept responsibility for their own mistakes. Taking ownership and taking risks increases the chance of error. Leaders admit, learn and move on without making excuses.
7. Future leaders take responsibility and don't single people out or shift blame. Whilst any error is still acknowledged, it is ‘ours’ not the fault of an individual.
8. Future leaders inspire and bring out the best in others as their passion and drive are contagious and set the standard for others to aspire to.

Anyone who exhibits more than half of the traits listed above could be one of your emerging leaders and offered the training and development they need to maximize their capabilities.


“*It’s a fine thing to have ability, but the ability to discover ability in others is the true test.”

-Elbert Hubbard
Life Management
Student leaders are not only organization leaders but also students, spouses and friends. In short, there is more to student leaders' lives than the organizations they lead. A key to balancing all the different roles student leaders must take on requires effective use of their time. The following are some brief hints on how to make the most of your time and some suggested personal characteristics of good time managers.

- **List your goals** | Start with long-term goals and then narrow down your short-term goals. Set your priorities, not only for your goals but the roles you must fulfill.

- **Make a daily “to do” list** | Set your priorities every day. This keeps you on track with your short-term and long-term goals.
  - **Start with the “A’s”** | Categorize your list into A, B and C groups, with A being the most important. Then take the items in the B group and redistribute them to the A and C groups. This way you end up with a list of only high and low priorities. However, be careful to not ignore C items; if they are forgotten about they can turn into urgent A priorities.

- **Always ask yourself ...** | “What is the best use of my time right now?” Do this whenever you have a free moment.

- **Handle each item just once** | If you pick up a piece of mail or receive a note, handle it then and there. Do not set it down before you resolve it, even if that means making a note to yourself to handle it later.

- **Do it NOW** | Do not procrastinate. Remember every big project is just a lot of little projects put together. Take each element one at a time.

- **Delegate** | Give tasks to other people so they can help.

Motivation
How can one promote a higher level of intensity within the chapter? It’s EASY; just follow these 5-steps:

1. **Strive to create a strong sense of belonging for everyone involved in the group; the members should feel as if they are honestly needed for whom they are.**
2. **Foster discussion with the group to set clear and precise goals/objectives for the chapter and ensure progress is communicated and celebrated.**
3. **Establish a definition of what is expected of each brother so they realize the expectations others have of them.**
4. **Assign responsibilities challenging others within a range of abilities and interest. These should be responsibilities which contribute to reaching the goals/objectives.**
5. **Observe the progress of the chapter toward completing the goals/objectives.**

When motivating others, remember and understand their personal values may be different than yours. What makes sense to you may not make sense to them. By trying to see something from another person's point of view and empowering brothers to do what they are passionate about will help the brother and the chapter grow.
**Specific** - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

*Who:* Who is involved?

*What:* What do I want to accomplish?

*Where:* Identify a location.

*When:* Establish a time frame.

*Which:* Identify requirements and constraints.

*Why:* Specific reasons, purpose or benefits of accomplishing the goal.

**EXAMPLE:** A general goal would be, "Get in shape." But a specific goal would say, "Join a health club and workout 3 days a week."

**Measurable** - Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal. To determine if your goal is measurable, ask questions such as......How much? How many? How will I know when it is accomplished?

**Attainable** - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals. You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

**Realistic** - To be realistic, a goal must represent an objective toward which you are both **willing** and **able** to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. But be sure that every goal represents substantial progress. A high goal is frequently easier to reach than a low one because a low goal exerts low motivational force. Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love. Your goal is probably realistic if you truly **believe** that it can be accomplished. Additional ways to know if your goal is realistic is to determine if you have accomplished anything similar in the past or ask yourself what conditions would have to exist to accomplish this goal.

**Timely** - A goal should be grounded within a time frame. With no time frame tied to it there's no sense of urgency. If you want to lose 10 lbs, when do you want to lose it by? "Someday" won't work. But if you anchor it within a timeframe, "by May 1st", then you've set your unconscious mind into motion to begin working on the goal.
The following action items will ensure your term starts off on the right foot. As a chapter officer, it is important that you are familiar with all the resources available to you and the chapter. These resources include materials produced by the Fraternity and local resources (volunteers, alumni) near your chapter. The key to a successful chapter is recognizing how much you can do and when to ask for help. There are thousands of alumni and volunteers who have been in your shoes and are willing to help. Use their experiences to enhance yours!

Action Items:
- Read this officer manual. You must know your duties and those of your fellow officers.
- Study the chapter Bylaws.
- Review the Board of Directors’ Statement of Policy. Pay special attention to the Risk Management policies. All of these are essential to a healthy chapter and are each officer’s responsibility.
- Review the Constitution and Statutory Code.
- Become familiar with Robert’s Rules of Order.
- Review the Ritual of Alpha Kappa Psi (version 8 or higher).
- Know the fraternity’s vision, core values and guiding principles.
- Log-in to www.akpsi.org to set-up a profile and become familiar with how to use the chapter reporting tools.
- Read the Road to Brotherhood; being familiar with it will be essential in order to properly use it as a reference tool.
- Review the Annual Chapter Report (ACR). The ACR allows you to work together with the chapter advisor and Fraternity to track key components of the chapter. The ACR will help you pass on historical information and chapter data to future members, as well as set short and long-term goals.
- Contact the chapter and faculty advisors to set up personal meetings.
- Set a time for weekly executive board meetings.
- Notify the Heritage Center staff, chapter advisor and regional director of any change in officer names for communication purposes. Ensure the chapter’s mailing address is current.
- Become familiar with the resources found at www.akpsi.org.
- Understand the fraternity organizational structure so you can direct your questions to the correct place.
- Have an emergency contact plan so you can contact chapter members in case of emergencies.
- Be professional – you are the role model for the chapter’s behavior.

General Liability Insurance

I. INTRODUCTION
The purpose of this manual is to give you an understanding of insurance coverage provided and information to properly report all actual and potential liability and property claims with which you may become involved. A certificate of insurance showing proof of coverage is provided with this manual. The final responsibility for the success of the insurance program rests with our fraternity and chapter. It is always important to remember that our first line of defense in liability matters is loss prevention, next is loss control, and the insurance contract is the final line of defense. The undergraduate and alumni members’ willingness to understand and assume the responsibility of sound risk management practices is a cornerstone of our program. In the event that an incident or claim does arise, the Alpha Kappa Psi Fraternity Heritage Center and Willis Insurance, will oversee the effective handling of all incident and claim investigation. An incident reporting form that must be completed and submitted at the time of any incident that results in bodily injury or property damage can be found at www.akpsi.org in addition to a full insurance and claims manual.
II. LAWSUITS
There will be occasions when lawsuits may be served on a member of your chapter. As there is only a limited
time to answer a lawsuit, the following procedure applies:
   a) Treat any potential, actual claim or lawsuit as a high priority item.
   b) Utilizing the incident reporting form, note all relevant information.
   c) Forward the suit and incident report by U.S. Postal Service Express Mail to the Alpha Kappa Psi
      Fraternity, Heritage Center, Attn.: Brian Parker, Managing Director of Operations.

III. GENERAL LIABILITY CLAIMS
The types of General Liability claims can be numerous and usually arise out of conditions of a chapter’s
premises. They more than likely involve injury or damage to someone other than an employee or an officer of
the fraternity. While on the scene, if possible, get all names, addresses and phone numbers of all parties
involved, as well as any witnesses to the accident. Immediately complete the incident reporting form and
submit.

IV. WHAT SHOULD BE REPORTED?
Bodily injury to anyone other than an employee and any property damage for which there is a possibility that a
claim may be made against Alpha Kappa Psi Fraternity. Be sure to fully complete the enclosed incident
reporting form that will provide the needed information regarding the claim. It is imperative that all losses or
incidents be reported immediately to the Alpha Kappa Psi Heritage Center (See phone numbers and address
on below). The Alpha Kappa Psi Fraternity Heritage Center is responsible for providing the initial report of the
claim to HRH/Kirkl & Co, Inc. Once the claim report is sent to HRH/Kirkl & Co, Inc. you will likely be
contacted directly by HRH/Kirkl & Co, Inc. to discuss the incident. If you are unable to obtain necessary
details when first notified of any incident, still report any known facts.

V. INCIDENT/CLAIM REPORTING

<table>
<thead>
<tr>
<th>ATTN: Brian Parker</th>
<th>ATTN: Mick McGill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing Director of Operations</td>
<td>Vice President, Client Advocacy</td>
</tr>
<tr>
<td>7801 E. 88th Street</td>
<td></td>
</tr>
<tr>
<td>Indianapolis, IN 46256-1233</td>
<td>10707 Pacific Street, Suite 200</td>
</tr>
<tr>
<td>(317) 872-1553 – Phone</td>
<td>Omaha, NE 68114</td>
</tr>
<tr>
<td>(317) 872-1567 – Facsimile</td>
<td>(402) 898-4199 – Phone</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:mmcgill@willis.com">mmcgill@willis.com</a></td>
</tr>
</tbody>
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VI. GENERAL LIABILITY INSURANCE PROGRAM
The following description is a summary only and is not intended to serve as a substitute for the actual
insurance contract. The Alpha Kappa Psi Fraternity insurance program provides Blanket Public General Liability
Coverage of $1,000,000 per occurrence with a $2,000,000 general aggregate for all participating chapter and
chapter house organizations. (See the end of this section for explanation of types of coverage.) The coverage is
for bodily injury and property damage. This protects the local chapter, its officers and members, the house
corporation and the fraternity, including appointed volunteers, from claims arising out of bodily injury and
property damage occurring at the premises or at chapter functions away from the premises. It also protects
against claims arising out of libel, slander, false arrest, invasion of privacy, eviction from the premises,
consumption of food and beverages and incidental malpractice. It must be understood, however, that our
coverage is for general public liability. It is not accident insurance covering initiated and uninitiated members
for injuries sustained on the chapter premises and/or in chapter activities. Liability insurance is not a substitute
for medical insurance. Further, it is not Workers’ Compensation Insurance, which may be required for chapter
employees such as cooks and housemothers.

Insurer: Liberty Surplus Insurance Corporation
Policy Period: December 1, - November 30
Policy Numbers: DGLCH184369035
Adding Additional Insureds

Additional Insureds may be added to this policy. Such insureds may be your landlord, college, university and/or proprietor from whom the chapter may be renting property for a special event. **Request for an additional insured endorsement should be made in writing at least three weeks in advance of any event** and sent to Alpha Kappa Psi Fraternity Heritage Center, Attn.: Brian Parker, Managing Director of Operations, 7801 E. 88th Street, Indianapolis, IN 46256-1233. Phone (317) 872-1553, Fax (317) 872-1567. Upon approval of the request by the Alpha Kappa Psi Administrative Office and the insurance carrier Willis will issue a certificate of insurance with the original forwarded to the Additional Insured and a copy to the Heritage Center.

What Doesn’t Our Coverage Include?

i. Any claim of bodily injury and/or property damage from an incident resulting when:
   1) An illegal act was performed.
   2) An intentional act was performed.
   3) A contract made by the chapter is broken.
   4) There is any discharge, release or escape of smoke, vapors, soot, fume, acids, toxic chemicals, etc... upon land, the atmosphere of any water course or body of water.
   5) A chapter employee is hurt on the job. Each chapter with any employees must purchase Workers’ Compensation coverage locally.

ii. Any claim of property damage to property owned by, rented by, used by, or cared for by the chapter. An example, the chapter rents a portable generator for an outdoor function, and while it is in the care, custody and control of the chapter it is damaged and the lessor holds the chapter responsible and liable. No coverage is available under the Alpha Kappa Psi Fraternity liability insurance contract.

House Inspections

The insurance company has the right to make inspections and surveys at any time, give Willis Insurance and Alpha Kappa Psi Fraternity reports on the conditions that are found and recommend changes. Any inspections, surveys, reports or recommendations relate only to insurability and the premiums to be charged. Chapters and house corporations will be given advance notification of any inspections and copies of all reports.

Legal and Illegal Activity

Simply stated, no insurance policy in the world provides coverage for violations of the law. The Alpha Kappa Psi Fraternity insurance program is no exception to this rule. The key points to understand are:

- Compliance with federal, state, local and institutional (college or university) laws and regulations is required.
- Compliance with all regulations and policies of Alpha Kappa Psi Fraternity is required.

Those individuals who choose to violate these rules may void the protection for themselves under the Alpha Kappa Psi insurance program. **Every effort has been made to avoid their actions from jeopardizing the other members, other entities, or other named insureds protected by the Alpha Kappa Psi program.** The following brief examples are intended to provide illustration and do not represent legal advice.

i. With the broad awareness of its membership, the chapter serves alcohol to a minor in violation of the law at a chapter-sponsored function. In the event of an injury, claim or lawsuit, those persons found to be in violation of the law and/or Alpha Kappa Psi Policy (in this case the entire chapter) most likely would be without insurance protection. The other named insureds would be protected (i.e. the Fraternity, house corporation or alumni volunteers).

ii. Two of the members of a 65-man chapter cause injury to someone in connection with a hazing incident. This activity was unauthorized and done secretly without the knowledge of the chapter,
and strictly against chapter policy. In the event of an injury, claim or lawsuit, those persons (in this case, the two members) found to be in violation of the law and Alpha Kappa Psi Policy could be without insurance protection. The chapter, house corporation and other named insureds would be protected.

Great effort has been made to ensure coverage will be provided to those individuals and entities exposed to claims through no fault of their own. Chapters and chapter officers are protected from the unauthorized actions of individuals. The assets of house corporations are protected from the unauthorized actions of their chapters. Chapter Advisors are protected from the unauthorized actions of their individual chapter members and the chapter as a whole, as are the house corporations and all other appointed alumni volunteers involved with the Fraternity.

All questions regarding insurance interpretation and coverage should be directed to Willis Insurance. c/o Trude Smouse, 10707 Pacific Street, Suite 200, Omaha, NE 68114, Phone (800.736.4327, email smouset@willis.com.

Hazing Policy
Alpha Kappa Psi’s Hazing Policy can be found in the Board of Director’s Statement of Policy and online at www.akpsi.org. It shall be the responsibility of all members of Alpha Kappa Psi Fraternity to determine college, university or other legal jurisdiction policy regarding hazing, mental or physical, and to comply totally with such policies.

Hazing Prevention
When organizations are challenged to eliminate hazing practices, some members are often resistant to this change. In many cases, those who are most vocal against eliminating hazing are those who are upset about the hazing they themselves endured (but don’t admit this publicly) and expect others should be “abused” as well in order to gain “true” membership in the group just like they did.

Of course, if you try to eliminate hazing in your chapter, you will likely encounter many elaborate reasons for why this will be devastating for your group. While there will be some staunch supporters of the status quo, there will be many who can be convinced of the negative effects and potential risks of hazing. Believers in the supposed "benefits" of hazing may be more likely to change their opinion if they can envision some alternatives. The following are supposed benefits hazers believe they accomplish and some alternatives you can instill in your chapter that will accomplish the same goal:

- Foster unity:
  - Brother retreat.
  - Visit a ropes course to work on group cohesiveness, communication and leadership skills.
  - Non drinking socials to learn about each other.
- Develop problem-solving abilities:
  - Have discussions about chapter weaknesses such as poor recruitment, apathy and poor scholarship, and develop solutions the chapter might then adopt (i.e. create a business plan).
  - Do groups for rituals so they can work under a deadline.
- Teaches you to work under stress:
  - Prepare a challenging fundraiser and see it through to the end.
  - Have an interview workshop to prepare you better for tough interviews.
- Develop leadership skills:
  - Encourage participation in school/campus activities outside of the chapter.
  - Encourage new members to get involved in committees and/or leadership roles.
  - Develop a peer mentor program within your group for leadership roles.
- Invite school/community/business leaders into the chapter to share their experiences.
- Instill a sense of membership:
  - Start new traditions — it only takes a few academic terms for it to become a tradition.

**Believe it or not:**
Chapters found responsible of hazing have been required to eliminate hazing in order to stay open as a chapter of Alpha Kappa Psi. These chapters report that eliminating hazing increased member involvement therefore reducing apathy!

**Parliamentary Procedure**

**Basic Principle: Minority is heard but majority rules**

I. **Establish a quorum**
   A quorum is the number of people who must be present to take legal action on business matters and is essential to conducting business meetings. The quorum is stipulated in the bylaws, and before any business is discussed, the chair should establish for the record that a quorum exists.

II. **All members have equal rights**
    These include the right to make motions, debate, and vote. You need a two-thirds majority vote to deprive members of basic rights — such as closing or limiting debate and closing nominations. No member may be forced to vote, silence gives consent. General business — majority of those present

III. **Debate, decorum, and order**
    Only one main motion (one subject) may be considered at a time, and only one person may speak at a time. Anyone who wishes to make a motion should first be recognized by the chair and preface the motion with the words, “I move that.” If someone wishes to second the motion, that person does not have to wait to be recognized but merely calls out, “I second the motion.” Without a second motion, the chair moves on to the next agenda item. After the motion has been made and seconded, the chair restates the motion, which is termed a main motion. Discussion begins. To ensure order and that only one person speaks at a time, the chair recognizes members before they may speak. There must be an opportunity for at least one pro and one con for each motion and amendment. Technically, after a second is made, a motion cannot be withdrawn (not efficient to enforce).

IV. **Amendments**
    The purpose of an amendment is to change a motion already under consideration. If a member believes the right topic is being discussed but wants to modify the wording of the motion, he or she calls for an amendment. Technically, a motion may be amended, and the amendment to the motion may be amended, but no further amendments may be made. Amendments are motions, and as such, they require a second and full debate. Amendments can slightly change the main motion. Typically, if the author of the original motion agrees with the amendment it can be accepted as a “Friendly Amendment” and incorporated into the original motion without the need for debate or a vote.

V. **Closing Debate**
    A member who wishes to end debate may interrupt discussion and say “I move/call the previous question.” This motion requires a second and must receive a two-thirds majority vote. Should it receive a two-thirds majority, the chair then states, “The previous question has been called, all those in favor of the motion to...”

VI. **How to Run a Meeting**
    A. Decide how strict to be with parliamentary procedure — generally, the larger the group, the more strict you should be.
B. How will one be recognized to speak? — typically by raising your hand then being called upon by the chair. Large assemblies may have fixed microphones where lines are formed to speak.

C. Chair controls flow of meeting.
   i. Must appear unbiased, can never state an opinion on the motion before or during debate.
   ii. To be effective, must control flow of meeting by:
      iii. Quickly and decisively granting permission to speak.
      iv. Always watching that comments are being made at the appropriate times (a pro should be a pro, not a public service announcement; points of information should be questions not pros/cons). Always stop someone and ask him or her to explain his/her point if it sounds like the granted time is being appropriately used (if it sounds like someone is making a con during a point of information).
      v. Quickly and decisively making judgments on points of order.
      vi. Prompt for actions if meeting slows down (chair will entertain motion to _____ — such as close debate, open a window, consider “X”).
      vii. Don’t be afraid to take a recess if you need to clarify points or get some information.
      viii. Be quick to keep people in order (not speaking out of turn).
      ix. Don’t let debate get personal — name-calling is not allowed (try to get people to speak in the third person when referring to other people in the room and to address actions not people).

D. Use other resources — Warden, Parliamentarian, etc.

VII. Efficiency Tips
   A. Most motions can be voted on by acclamation (general consent).
   B. Use voice vote for motions. Chair’s ruling stands on results of voice vote unless “call for division” is called for, then vote count is needed.
   C. Chair cannot make motions but can offer to “entertain” a motion which may fix a particular sticking point in debate.
   D. If chair doesn’t know the answer to a “point of information,” he or she can call on someone else to answer it.

VIII. Potential Problems
   A. Noisy individual — warning from chair then warden removes.
   B. Bad environment (hot, cold) — chair can recess meeting to try remedy the situation.
   C. People speaking without being recognized — reminder from chair to wait to be recognized, if doesn’t work, warning from chair then warden removes.
   D. Debate lasting too long — “without objection, chair ends debate after two or more pro/cons.” (Two of the same back-to-back.)
   E. Meeting lasting too long — “without objection, chair rearranges agenda and will postpone consideration of certain items until next meeting.”
   F. Everyone wants to speak — in the order they raise their hands, a list is made, chair simply calls names off this list.

Adopted from Parliamentary Procedure: A Few Rules Help Keeps Order, by Kathy Gill”

“Entrepreneur Larry Wilson defined the difference between passion and drive as the difference between expressing yourself and proving yourself.” -- On Becoming a Leader By Warren G. Bennis
# Parliamentary Procedure at a Glance

Here are some motions you might make, how to make them, and what to expect of the rules.

<table>
<thead>
<tr>
<th>To Do This:</th>
<th>You Say This:</th>
<th>May you interrupt the speaker?</th>
<th>Do you need a second?</th>
<th>Is it debatable?</th>
<th>Can it be amended?</th>
<th>What vote is needed?</th>
<th>Can it be reconsidered?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADJOURN MEETING</td>
<td>“I move that we adjourn”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>CALL AN INTERMISSION</td>
<td>“I move that we recess for...”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>COMPLAIN ABOUT HEAT, NOISE ETC.</td>
<td>“I rise to a question of privilege”</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No Vote</td>
<td>No (usually)</td>
</tr>
<tr>
<td>TEMPORARILY SUSPEND CONSIDERATION OF AN ISSUE</td>
<td>“I move to table the motion”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>No</td>
</tr>
<tr>
<td>I CALL QUESTION END DEBATE AND AMENDMENTS</td>
<td>“I move the previous question”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
<td>No</td>
</tr>
<tr>
<td>POSTPONE DISCUSSION FOR A CERTAIN TIME</td>
<td>“I move to postpone the discussion until...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>GIVE CLOSER STUDY OF SOMETHING</td>
<td>“I move to refer the matter to committee”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>AMEND MOTION</td>
<td>“I move to amend the motion by...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
<tr>
<td>INTRODUCE BUSINESS</td>
<td>“I move that...”</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**The motions listed above are in order of precedence... below there is no order...**

| PROTEST BREACH OF RULES OF CONDUCT               | “I rise to a point of order.”          | Yes                             | No                    | No               | No                 | No Vote             | No                     |
| VOTE ON A RULING OF THE CHAIR                   | “I appeal from the chair’s decision”   | Yes                             | Yes                   | Yes              | No                 | Majority            | Yes                    |
| SUSPEND RULES TEMPORARILY                       | “I move to suspend the rules so that...” | No | Yes | No | No | 2/3 | No |
| AVOID CONSIDERING AN IMPROPER MATTER            | “I object to consideration of this motion” | Yes | No | No | No | 2/3 | 6 |
| VERIFY A VOICE VOTE BY HAVING MEMBERS STAND     | “I call for a division” or “Division!” | Yes                             | No                    | No               | No                 | No Vote             | No                     |
| REQUEST INFORMATION                             | “Point of information.”               | Yes                             | No                    | No               | No                 | No Vote             | No                     |
| TAKE UP A MATTER PREVIOUSLY TABLED              | “I move to take from the table...”     | No                              | Yes                   | No               | No                 | No                  | Majority              |
| RECONSIDER A HASTY ACTION                       | “I move to reconsider the vote on...”  | Yes                             | Yes                   | No               | No                 | Majority            | No                     |

**Notes:**
1. Unless vote on question is not yet taken.
2. Unless the committee has already taken up the subject.
3. Only if the motion to be amended is debatable.
4. Except in doubtful cases.
5. A majority vote in negative needed to prevent consideration of main motion.
6. A 2/3 vote in negative needed to reconsider a hasty action.
7. Only if the main question or motion was not, in fact, considered.
8. Only if motion to be reconsidered is debatable.
The Treasurer is responsible for recording the financial transactions of the chapter. The Treasurer maintains and reconciles all the accounts of the chapter, collects monies owed to the chapter, and pays bills as incurred by the chapter. The Treasurer may serve on the Audit and Finance Committee and the Fundraising Committee (a separate or subcommittee may exist).

**Duties**
- Lead the preparation of annual budget.
- Responsible for adherence and interpretation of annual budget.
- Keep accurate account of chapter financial records.
- Heavy coordination with officers and committee chairs.
- Determine financial goals.
- Ensure fundraising is fulfilling its goal.
- Enforce collecting of chapter dues.
- Membership reporting and fee control to the Heritage Center.
- Year-end audit and clean up.
- Update chapter roster with the Heritage Center (this is what the fraternity uses to invoice chapters for student member dues and insurance fees).
- File IRS Form 990 with IRS and forward a copy to the Heritage Center.
- Utilize the [Chapter Finance Manual](#) and [Chapter Audit Manual](#).

**Bonding**
The Treasurer is bonded by the Fraternity to protect the chapter from financial loss due to embezzlement or misappropriation of funds by the Treasurer. In the event of such an occurrence, the bonding agency guarantees full restitution to the chapter and is authorized to pursue all legal remedies, including criminal prosecution, against the perpetrator(s) and to recover owed funds. The chapter is invoiced an amount to pay the bonding charge. This amount is included on the insurance invoice received by the chapter each year.

**The Alpha Kappa Psi Accounting System**
An accounting system is required for all chapters to use by the Constitution. The AKPsi Accounting System consists of the following items:
- Invoices
- Receipts
- Expense Vouchers
- Membership Records
- Standard Chart of Accounts
- Cash Journal Sheets
- Loose-leaf binder for Accounting

**Budget**
The budget is prepared each year as soon as possible by the treasurer and lists the anticipated revenues and expenses for the entire academic year. The treasurer should review budgets from past years, as well as entries past treasurers have documented when preparing the budget. The budget must be presented to the chapter for approval and a copy sent to the chapter advisor, section director, and regional director by Oct 15 (fall budget) and Feb 15 (spring budget).
Audit
A review of the books by the Audit and Finance Committee should be made whenever a new treasurer is elected, thus absolving the new treasurer from any liability for mishandling of funds by the outgoing treasurer. A complete annual audit is to be conducted after the close of the chapter’s fiscal year (March 31). The audit should be performed by members of the Audit and Finance Committee (other than the treasurer), by a qualified faculty member, or by a qualified accountant. Copies of the audit should be maintained in the chapter’s files, and copies should be forwarded to the chapter advisor, section director, regional director and Heritage Center. Each chapter is required (at minimum) to send a copy of the chapter audit to the Heritage Center by May 31 each year. Reference the Chapter Audit Manual when necessary.

IRS Form 990
Chapters of Alpha Kappa Psi must complete and forward an IRS Form 990 annually on the 15th day of the fifth month after the close of the fiscal year (August 15) in order to retain their tax-exempt status. Form 990 and instructions on completing the form may be obtained from any IRS office or by contacting the Heritage Center. A copy should also be forwarded to the Heritage Center. It is the responsibility of the chapter to ensure a correct chapter Federal Tax ID number is on file at the Heritage Center.

Dues
The fraternity bills each chapter in September and January for each student member on the chapter roster. Payment must be made no later than October 15 and February 15, respectively.

As soon as the semester/quarter begins, the treasurer should remind the brothers of the amount and due date for chapter dues. Each chapter treasurer must ensure accurate payments are made, records kept, and that both the chapter and the Heritage Center agree on the chapter account (count of members). All payments mailed to the Heritage Center must include a completed chapter accounting form. The chapter should send ONE (1) Chapter check for each of the following: pledge fees, initiation fees, dues and insurance. Individual member checks (or individual online payments) will not be accepted.

All payments mailed to Heritage Center must be itemized. Make sure you are fully explaining the payment. If payments are not designated it will be applied to the chapter’s general account.

When you receive the invoice and roster for member dues, please review the roster carefully. Any necessary additions or corrections can be updated using the membership tools online at http://www.akpsi.org/cmt.

Meet with delinquent brothers to determine the reason for the delinquency and attempt to obtain full payment. If full payment cannot be made at one time, the executive board may decide upon another payment process. If a brother will not repay the debt, the treasurer should make a motion to suspend the brother at the next chapter meeting. Refer to the Constitution and Statutory Code for policies regarding financial delinquency.

Instructions for payment of dues and fees
Please read the following information regarding dues and fees carefully. Each chapter treasurer should be familiar with this information to ensure accurate payments are made to the Fraternity, and records are properly kept. This document will help keep the chapter’s records and the records of the Heritage Center balanced.
Policy on past due balances
Chapters are not allowed to carry past due balances. The intent of this is to facilitate cash flow management on an annual basis. Past due balances appear on the monthly chapter statement in one of four aging categories: 0-30, 31-60, 61-90, or over 90 days past due. Chapters will be notified in writing when balances appear later than 30 days with copies sent to the chapter advisor, regional finance manager, section director and regional director. If the issue is not resolved or paid within 30 days after receiving the notice, the chapter could be asked to appear before a “Show Cause Hearing.” If a balance is carried for more than 90 days, the fraternity president may recommend revocation of the chapter’s charter without further investigation or hearing.

Credit card policy
The Heritage Center will accept credit card payments on behalf of the chapter for payment of dues and fees (VISA, MC, American Express, Discover). Only one credit card will be accepted for payment of fees; individual payments will not be accepted.

Pledge fees
Pledges must be reported after every induction ceremony, and sent to the Heritage Center, along with $39.00 per pledge. This is due within seven (7) business days of the induction ceremony. If both the form and the money are not received within 30 days of the induction ceremony, the chapter will be assessed the greater of $25.00 or 5% of the total fees. Upon receipt of the forms and money, the Heritage Center will send within 48 hours one PEP Manual and Fraternal Pledge Exam for each pledge listed on the pledge report. In order to have pledge manuals at the beginning of the pledge process, chapters are encouraged to maintain an inventory. If a pledge drops the program within ten days of induction, the pledge fee may be credited to the chapter upon written notification within the ten day period (mail@akpsi.org). If this happens after the pledge manuals have been sent, the chapter will still incur the price of the manual(s) sent.

Membership dues
The Heritage Center must receive the chapter’s payment of student member dues BY October 15 for the fall semester and February 15 for the spring semester. If either of these dates should fall on a weekend, payment will be accepted without penalty on the following Monday. Late payment of dues will result in a $25.00 fine for the billing period and a 15% penalty for every 30 days late.

“You can’t build a reputation on what you are going to do.”
— Henry Ford.”
**Membership roster**
When you receive the invoice and roster for student member dues, please review the roster very carefully. Any member listed on the roster who is not in good standing with the chapter for the academic term can be removed by updating your roster online at www.akpsi.org/cmt by **November 1** for the fall term and **March 1** for the spring term. If your roster is not updated by these deadlines, your chapter will be responsible for these dues. If a member is being suspended, please state why on the form. If the reason for suspension is failing to meet financial obligations, please include the dollar amount owed as well as a plan for reinstatement. Any members who are returning from an internship, suspension or for another reason should be added to the roster by submitting a reinstatement.

**New initiates**
New members must be reported within seven (7) days of the ceremony and **$65.00 per initiate** must be submitted to the Heritage Center. If both the forms and the money are not received within 30 days of the initiation ceremony, the chapter will be assessed the greater of $25.00 or 5% of the total fees. Every chapter may initiate one Faculty Member and one Honorary Member per fiscal year (7/1 to 6/30) for an administrative fee of $15.00 each. The chapter must submit an application BEFORE the initiation (found in the *Student and Alumni Awards Catalog*). Additional faculty and honorary initiates require the regular $65.00 fee and application. All faculty and honorary initiates must be reported after the ceremony.

**Correspondence**
All correspondence mailed to the Heritage Center concerning chapter finances should be accompanied by a completed *Chapter Accounting Form* (**Fall** or **Spring**).

**Returned checks**
The Heritage Center reserves the right to charge the chapter the greater of $25.00 or 5% of the check amount for all checks returned for non-sufficient funds, closed account, no signature, or any other reason which causes a deposited check to be returned.

**Chapter credits and refunds**
Overpayments or refunds will be applied to the chapter account. This credit will appear on the monthly statement and may be used for future orders or billings. If there are questions regarding the monthly statements, please contact the Heritage Center. For large overpayments in excess of $1,000, the Heritage Center will issue a check upon written request from the chapter treasurer. Checks will only be written to the chapter.

**Accounting Controls**
- Two signatures required on all checks.
- A cash on hand fund of not more than $25.00 unless a larger amount is authorized by the chapter at a regular meeting.
- Each disbursement must be supported by either a voucher or an invoice. Approval for payment must be indicated by the alternate check signer when the check is signed. Signers of the check should not be the payees.
- Each voucher or invoice should be cancelled by marking the invoices paid, with the date paid and check number also indicated on the invoice voucher. These will be maintained for at least a three-year period and should be filed by vendor or some other formal filing system.
Receipts and disbursements must be summarized and posted to the general ledger at least monthly. The general ledger should be balanced after each posting.

Bank accounts must be reconciled with the general ledger on a monthly basis.

Membership ledgers should reflect the current balance owed by each member. These ledger cards should be posted on at least monthly, and the total of these cards should be reconciled to the control account in the general ledger.

The chapter’s fiscal year budget will be prepared in accordance with the standard chart of accounts.

Pay invoices immediately to avoid late fees and penalties.

Chapters are not allowed to carry past due balances.

Contact your regional finance manager if you have questions or need help resolving any financial issues.

Make copies of every check sent to the Heritage Center along with backup documents describing what each payment was for.

Send all payments to the Heritage Center by certified mail/return receipt and attach a copy of the receipt to your check copy to facilitate dispute resolution.

**Budgeting Basics**

- Be conservative.
- Prepare a yearly budget, split into semesters.
- Make sure you don’t spend more than what you will earn.
- Study your chapter’s spending trends for previous years and calculate an average amount for each category in your budget.
- Ask each of your officers and committee chairpersons for input on how much they will need to spend to exercise their duties.
- Add all your income sources.
  - Membership and pledge dues.
  - Fines and penalties income.
  - Fundraising income.
  - University funding.

**Add all your projected expenses**

- Bank fees
- Brother dues ($47.50/person)
- Fraternity/Regional education (PBLI, Convention/College of Leadership, etc)
- Initiation fees ($65/person)
- Insurance ($27.50/person; actual spring member dues + spring initiates)
- Officer training
- Pledge education
- Pledge fees ($39/person)
- Professional programming
- Ritual expenses
- Social events (parties, banquets, etc.)
- Supplies
Don’t forget to include funding for Regional/Fraternity events (PBLI, Convention)

- Estimate transportation, registration and lodging costs.
- Remember the fraternity will charge the chapter for one registration fee whether you send a delegate or not! Each chapter has $600 to use for convention registrations (Convention Savings Plan). Chapters are billed $150 per academic term.
- Set aside a portion of the brother and pledge dues to cover costs (i.e., increase dues by $3 and use it to fund attendance to fraternity/regional events).

Establish a travel reimbursement policy

- Brothers/pledges who meet requirements will be able to get reimbursements.
  - For example, 90% attendance at meetings plus attendance at a specified number of social, professional and charitable events.
  - Cover lodging costs based on quad occupancy.

Advantages of Budgeting

- Helps save money.
- Allows chapter to view where the money is going.
- Can be used as a tool to reduce costs and to plan fundraising needs.

Fundraising

Sometimes chapters find themselves needing more funds than they have available. In order to provide the quality of services to members and the university community, chapters find they need to raise additional funds. Below are some suggestions for running a successful fundraising campaign.

Funding sources for organizations:

- Membership donations — a basic source of funds. The least risky method.
- Foundations/grants — sources generally fund only new projects for traditional community groups and rarely fund for operating expenses. The time line between application and award are quite long. The politics of grants increase the difficulty of getting the award.
- Contributions from outside vested interests — merchants, parents, alumni, etc.
- Mutual benefit projects — donors with no direct link to the organization receive a service for their money. For example: sales of products, services, advertising, etc.
- Some companies will provide matching funds.

Ideas for successful fundraising:

- Check out the [How to attract and retain corporate sponsors eLearning](#).
- Host a bingo game – be sure to check with your institution about a gambling license.
- Hold a raffle – be sure to check with your institution about a gambling license.
- Run a good publicity campaign — people who have to be told who you are won’t give.
- Develop a detailed annual budget — show how much money you will earn and prevents you from premature spending.
- Set goals for funds to be elicited — this will prevent approaching only easy sources of funds who may expect to dictate your program.
- Assign one or two fundraisers and give different people responsibility for the current and next year’s budgets, to spread involvement and prevent expectations that one year will pay for the other.
• Develop a plan — maximize your communication and efforts by planning around major events. T-shirt sales, raffles and dance marathons are great anchors for smaller contests.
• Share the plan with everyone involved — get feedback and commitment.
• Guard against reduction of regular funding — inform regular funding sources additional funds raised will go to supplemental, not regular programs.

During the campaign:
• Never allow fundraising to disrupt regular services or programs.
• Assign each fundraiser reasonable portion of the total plan.
• First approach individuals with an interest in or connection to you/the chapter.
• Approach unrelated donors through mutual contact.
• Get organizations to match funds raised from their members. Match individual donations with large contributions. (People often give more if their money is doubled through matching funds.)
• Give donors something tangible for their money (a pen, receipt, certificate, etc.).

After the campaign:
• Follow-up immediately on pledges. (Generally only 50% of pledges actually pay. Immediate follow-up may raise this statistic.)
• Publicly reward fundraisers.
• Review campaign for successes and failures.
• Plan next year’s campaign.

Characteristics of a good fundraising campaign:
• The organization raising funds is respectable.
• Hard money is raised. Money which can be spent on what you want, rather than what the donor wants.
• Front money is avoided.
• Little is financially risked. As much as possible, supplies and services needed are donated.
• Incentives are built-in for donors and fundraisers.
• Money comes in over time, not in one lump sum. On the basis of contributions, the plan is reevaluated and reworked if necessary.
• Staff time is not eaten up with fundraising.
• Publicity for the organization is built in.
• The plan is repeatable.

Adapted from “Successful Fundraising” The University of Iowa Center for Student Involvement & Leadership

Required Fundraising Information:
The Omnibus Budget Reconciliation Act of 1987 (Public Law 100-203) imposes a requirement on tax-exempt organizations that a “conspicuous and easily recognizable” statement appear on all fundraising solicitations, including dues billings. This statement must specify that all contributions and payments made to the organization are nondeductible as charitable contributions for federal income tax purposes. The disclosure requirement became effective January 1, 1988. Failure to comply can result in a $1,000 per day penalty by the Internal Revenue Service.

This disclosure requirement is applicable to all organizations exempt from taxation under 501(c) of the
Internal Revenue Code except 501(c)(3) organizations. Other than the Alpha Kappa Psi Foundation, AKPsi is not aware of any Alpha Kappa Psi entities that are 501(c)(3) organizations. Therefore, the requirements of the act will need to be followed by AKPsi chapters, housing corporations, and all other entities within the Fraternity.

Alpha Kappa Psi has been advised by its legal counsel, Barnes and Thornburg LLP, that the following language should appear on all fund raising solicitations, dues billings, invoices and on the message side of any cards or tear-off sections that the contributors return with a contribution:

“Contributions or gifts to (insert the name of chapter, board of trustees, housing corporation, etc.) are not deductible as charitable contributions for federal income tax purposes. However, they may be deductible under other provisions of the Internal Revenue Code.”

This disclosure should be in the same size type as the main text of the solicitation and should either be at the beginning of a paragraph or stand alone as a paragraph. This disclosure rule also applies to telephone, television or radio solicitations. In the case of a telephone solicitation, the disclosure should be made in close proximity to the request for a contribution. Any follow up confirmations or billing statements should comply with the guidelines set forth above.

The Fraternity suggests this information is adopted by your chapter, colony, board, etc., to avoid any IRS penalties.

Exploring Student Government Funding

- Approach your university’s student government association, or the governing body which disperses funds to student organizations, and request a grant to pay for the registration fees, lodging and transportation expenses to Fraternity events (PBLI, Convention/College of Leadership).
- Also approach the dean of the business school for other avenues to help your chapter secure funds. Emphasize the educational program and how it will benefit your chapter members as business students.
- Plenty of sources exist for funding student organizations; you just need to find them. If you remain persistent, your chapter has a good chance to defray at least some of the expenses to attend. You’ll never know if you don’t ask.
- Your request for funding packet should contain the following items:
  - Brief cover letter — be concise and to the point.
  - Proposal — this is where you outline the exact dollar amount you are requesting. You should also emphasize why the funds are important and what benefit will be derived from their use.
  - Event publication/information

Collections

- Prepare invoices.
- Include a due date (i.e. the first general meeting of the academic term).
- Send invoices prior to the start of the academic term.
- If a member has financial problems and cannot pay; have he or she sign a promissory note.
  - First installment should be at least the amount due to the Heritage Center.
- Final payment should be made at least 61 days prior to the end of the academic term.
- Enforce late fees and penalties.
  - Generate invoices for late fees, penalties and non-attendance fines, and include a due date (no later than 60 days prior to the last meeting of the academic term).
- If a member does not pay, SUSPEND him/her (30 days after due date).
- Report this member on the website so you won’t be charged for someone who doesn’t pay (dues credit only if reported before November 1 and March 1).
- Include amount due by the brother.
- If a member is suspended for financial reasons he/she cannot vote, attend meetings, professional events, participate in committees, participate in social activities, etc. (I.e. anything related to the chapter until his/her fees have been paid and he/she is reinstated).

- Refer to the **Constitution and Statutory Code** for delinquency policies.
Frequently Asked Questions

What due dates do I need to know?
The most accurate and up-to-date due dates for your chapter are listed on www.akpsi.org. Check out the Calendar of Chapter Due Dates for the most up-to-date calendar planning.

When are the chapter minutes due?
Within seven days of your meetings. The Executive and Chapter Minutes are to be sent to the CA, SD and RD. All minutes should be sent to chapter members with 24 hours of the meeting.

What if the chapter roster is inaccurate?
Correct it immediately by logging into the chapter reporting tools at https://www.akpsi.org/cmt. Remember your dues and insurance billings are based on your roster.

Can first-year students pledge?
There is not a minimum GPA to pledge Alpha Kappa Psi, therefore freshman can pledge. Refer to the Statutory Code (Caput II Section 6) for more information.

Is there an inactive status?
No, circumstances such as internships, co-op, student abroad, military duty or medical/extreme hardship are considered for Leave of Absence status. Special exceptions have been made for those who are extremely ill, pregnant, etc., but approval is required by your RD. These members must be reported as Leave of Absence and they are to re-affiliate (and be reported as doing so) upon their return. There are NO “social memberships,” “senior status,” etc. Leave of Absence status is different than suspension due to attendance issues and/or financial delinquency.

How can a member be removed in good standing?
Only by leaving the university; this could be because they “drop out” of school, graduate with the degree in which they pledged (even if they stay on for grad school), transfer to another school or branch of your school (more than 50 miles).

Are there any circumstances when the brother must re-affiliate?
Yes, if the brother returns to the university at which their home chapter is located to complete the degree in which they pledged. (Examples of this would include conclusion of internships, co-op, and medical leave of absence.)

What are the different membership forms?
Chapter rosters can be updated online using the Chapter Management Tools at http://www.akpsi.org/cmt. Once you update your roster online, an e-mail is automatically sent to you confirming these changes have been requested. A second email will be sent once the changes are approved by the Heritage Center. Any officer currently reported to the Heritage Center can access the Chapter Management Tools.

- **Report Pledges** – Reporting of all new pledges. Information required: Full name, address, phone, e-mail address, date of birth, expected graduation year, induction date and expected initiation date. Download the Pledge Information Collection Form and have the pledges fill one out for easier input into the website. Due within seven business days of induction.
- **Report Initiates** - Reports your new brothers. Due within seven business days of initiation.
• **Chapter Roster Management** – Report status changes (graduating seniors, suspended brothers, leave of absences) and officer changes (incoming and outgoing officers; must be one of seven positions found in the *Constitution*; President, VP of Membership, VP of Admin, VP of Alumni Relations, Treasurer, Secretary, and MOR). A reason must be given for each suspension and Leave of Absence.

• **Member Reinstatement Form** – Reports brothers reinstated from temporary removal; also used to report affiliation of a brother who transfers from one university to another and joins the chapter.

**Can a brother resign from the fraternity?**
The membership of a member of the fraternity shall terminate upon the receipt of the member’s written resignation by the CEO of the fraternity or upon the member’s death. Any resignation does not relieve the member of any obligation incurred or commitments made before the resignation. (*Constitution, Article II, Section 8D*). Chapters cannot resign their members, members can only resign themselves.

A brother who resigns cannot attend any fraternity meetings, rituals or events and should not refer to his or her former membership or fraternity experiences in any document, such as résumés, employment applications, or job interviews.

**Can a chapter purchase alcohol?**
It cannot! See the risk management policies in the *Board of Directors Statement of Policy*.

**What is the chapter’s fiscal year?**
Per the *Constitution and Statutory Code* each chapter shall follow the fiscal year of April 1 – March 31. NO EXCEPTIONS.

**What is an audit and when should it be done?**
It is a review of all income and expenses and serves to ensure to the chapter, the outgoing treasurer and the incoming treasurer all funds have all been properly accounted for and any questions are resolved in a timely fashion. It should be done at the end of the treasurer’s term by the audit committee, should not include the treasurer and preferably will include at least one faculty/alumnus/CPA. A copy of the chapter audit is due to the Heritage Center by May 31 of each year after the conclusion of the chapter fiscal year (March 31). Chapters are encouraged to reference the *Chapter Audit Manual* for assistance.

**What are officer evaluations and when should they be done?**
Officer evaluations are an opportunity for the brothers to give the officers of the chapter feedback and constructive criticism on themselves in several categories. Some chapters do this once an academic term (after the first third of the term); others do it twice an academic term (at the 1/3 point and at the 2/3 point). It should be stressed that this is not personal and should be used as an anonymous way to help each officer grow and develop on a professional level. A sample officer evaluation can be found in the *Road to Brotherhood*.

**What is an incident report and when do I send one?**
An incident report is filled out whenever a negative event occurs, especially one which could result in legal issues, whether a lawsuit or police or judicial action. Examples are anytime the “authorities” (police, ambulance, univ. etc.) are involved. Even if you think it will “go away,” you should document it! Always consult with the RMT if there is even a question. When in doubt write it out! Incident forms can be found online in the *Insurance and Claims Manual*.

**How do I know who to send copies to?**
Anything sent to the Heritage Center should be copied to the RMT. Most items will be sent to CA, SD and RD.

**What is a Judicial Review Board?**
The purpose of the Judicial Review Board is to create a mechanism by which effective and efficient disciplinary action may be taken against brothers or pledges of the chapter in a timely fashion. This provision is not intended and shall not, at any time, circumvent any of the rights and privileges granted to the same by the Bylaws, the [Constitution and Statutory Code](#) or the [Board of Directors Statement of Policy](#) of Alpha Kappa Psi.

**MISSION:** The Judicial Review Board may review any action by, of, or between pledge(s), brother(s), and their guest(s) (for those actions they will be held accountable) which may be considered inappropriate behavior, detrimental to the reputation of Alpha Kappa Psi and this chapter, or endangers the continuous smooth operations of this chapter. The Judicial Review Board ensures that a complete and thorough investigation is conducted, establishing the validity of the charges, and, if valid, the guilt or innocence of the accused and establishing an equitable punishment in the case of the former.

The Judicial Review Board is a formal remedy for serious or severe grievances against members of Alpha Kappa Psi. Any personal or minor problems can usually be settled through more informal channels. The Judicial Review Board is also responsible for hearing appeals by members who have been fined for any reason. The Judicial Review Board is encouraged to contact the Fraternity Judiciary Committee with any questions or uncertainties.

The Judicial Review Board should not need to be utilized more than a few times an academic term. If the Judicial Review Board is being utilized too frequently this is an indication of deeper problems within the chapter and the Judiciary Committee should be consulted.

Anytime the Judicial Review Board conducts an investigation it is to fill out an Investigation Report Form found online and submit it to the Judiciary Committee. Anytime an investigation is due to an alleged violation of a risk management policy (hazing, alcohol or sexual harassment) the chapter must forward this information onto the Judiciary Committee for final review and ruling.

For more information on Judicial Review Boards, see the [Judiciary Committee Operations Manual](#) found online at [www.akpsi.org](http://www.akpsi.org).

**Where can I go to get additional education?**
Additional education is available through webinars and eLearnings on [www.akpsi.org](http://www.akpsi.org). They offer an opportunity to supplement your programming schedule with topics that are more difficult to find locally. The webinar schedule and topics change each academic year. For the most current schedule and to register go to [https://www.akpsi.org/webinars](https://www.akpsi.org/webinars).

All webinars are recorded and placed in the webinar library which you can access at any time here. Simply go to [www.akpis.org/webrecordings](http://www.akpis.org/webrecordings) to find a topic!

All eLearning programs can be found here: [www.akpsi.org/elearning](http://www.akpsi.org/elearning).
Glossary

Here are some common words and abbreviations used in Alpha Kappa Psi:

- **ACR: Annual Chapter Report**: chapter operations reporting tool
- **AVP: Area Vice President**: Leads an Area of AKPsi
- **BOD: Board of Directors**: group within fraternity responsible for setting policy and fraternity direction
- **BoDSoP: Board of Directors Statement of Policy**
- **CA: Chapter advisor**: An alumnus member who guides a chapter
- **CAB: Chapter Advisory Board**: smaller time commitment positions in specialty areas (recruitment, finance, etc.), under the direction of a chapter advisor and assist one specific chapter
- **CoL: College of Leadership**: held jointly with Convention
- **EVP: Executive Vice President**: assists the president
- **FA: Faculty advisor**: faculty member that guides a chapter
- **HC: Heritage Center**: central office for the fraternity, foundation and paid staff members
- **Induction**: Ceremony to become a pledge
- **Initiation**: Ceremony to become a brother
- **JC: Judiciary Committee**: reviews issues as related to the risk management policies on behalf of the fraternity
- **JRB: Judicial Review Board**: reviews membership issues within a chapter as pertains to rules and regulations
- **MT – Management Team**: consists of the president, executive vice president and 13 regional directors
- **OT: Officer Training**
- **PBLI: Principled Business Leadership Institute**
- **PEP: Pledge Education Program**: The only approved pledge program of the fraternity
- **RD: Regional Director**: oversees the chapters and volunteers within their region
- **RMT: Regional Management Team**: consists of CAs, FAs, SDs, regional managers and RD
- **RTB — Road to Brotherhood**: comprehensive membership program following the lifecycle of a brother from recruit to alumni
- **SD: Section Director**: oversees chapters within a portion of a region
- **YRS: Yellow Rose Society**: student giving program sponsored by the Alpha Kappa Psi Foundation