



# Chapter Officer Manual

Amended August 2021

This manual is intended to provide you with information that will help guide you in your venture to operate a world-class chapter/colony.

Roles of Chapter and Colony Officers	2
Chapter Elected Officers	3
Committees	5
Fraternal Excellence	6
Activity that Jeopardizes Chartered Status	7
Chapter/Colony Financial Obligations	8
Annual Reporting Deadlines & Online Resources	10
Officer Transition Modules	11
New Member Education	12
Member Financial Indebtedness	13
Programs and Conferences	15
Removal of Chapter Officers	17
Media Protocols	18

## Roles of Chapter and Colony Officers

Each Chapter functions as a self-operated, self-governed and self-financed group. Specifically, the Chapter is an unincorporated association under the law of the state where it is located and operates itself on a day-to-day, week-to-week, month-to-month and year-to-year basis. The Chapter selects its own officers, assesses dues it establishes, recruits new members, initiates members, conducts Chapter meetings, encourages fellowship, promotes education, participates as teams in intramural athletics, participates in campus and interfraternity programs, sponsors candidates for school offices, enjoys social events, sends delegates to the Convocation of the Fraternity, leadership conferences and other seminars, maintains a Chapter house and is responsible for financing its own activities. The Chapter operates itself on a day to day basis and is responsible for compliance with all applicable rules and regulations of the college or university where it is located and with all applicable laws of the various governmental bodies, local, state and federal and the Fraternity's Standards.

## Chapter Elected Officers

**The Sage (“President”)** shall serve as the administrative head of the Chapter/Colony, and perform such duties as usually devolved upon a presiding officer. He shall cause to be enforced at all times all the laws and provisions of both the Grand Chapter and his Chapter.

### Responsibilities:

- General management and conduct of the affairs of his Chapter,
- Provide for the installation of Chapter Officers, including his successor, at the end of his term of office
- Provide for educational programs that provide for continuing education of chapter members on topics such as
  - Health & Safety
  - Time Management
  - Ritual Education
  - Financial Management

**The Second Counselor (“Vice-President”)** shall serve as the operations manager of the Chapter/Colony, and perform such duties as usually devolved upon an operations officer. He shall preside over the Chapter in the absence or disability of the Sage.

### Responsibilities:

- Provide oversight of the Chapter’s committee system as prescribed by the Chapter’s bylaws.
- Assist in appointing committee members with the Sage

**The Third Counselor (“Treasurer”)** shall serve as the financial manager for Chapter/Colony, and perform such duties as usually devolved upon a financial officer. At the expiration of his term of office he shall turn over to his duly elected or appointed successor all monies, securities, books, files, records and other properties belonging to the Chapter and entrusted to his care and make an official transfer of authority over the chapter’s bank account(s).

### Responsibilities:

- Ensure prompt payment of all Sigma Pi invoices
- Manage the budget planning process including execution of the approved the budget
- Implement a system whereby all checks shall be countersigned by the Sage.
- Oversee the invoicing and collection of chapter dues
  - Sigma Pi has partnered with [OmegaFi](#) to provide chapters/colonies with financial management support
- [Budget Planning](#) and Monitoring
- Ensure all financial statements and records are submitted on time
  - IRS Form 990
    - For help on submitting the IRS 990 form click on this link: [IRS](#)
    - *OmegaFi does offer this service for a small fee*

**The Fourth Counselor (“Secretary”)** shall serve as the secretary for the Chapter/Colony, and perform such duties in order to maintain accurate record of the proceedings of all meetings of the Chapter.



**SIGMA PI**

**Responsibilities:**

- Oversee the Chapter Report Card Program for deadline compliance
  - See [Chapter Report Card](#)
- He shall keep an accurate record of attendance at meetings
- Ensure an archive system for filing of correspondence, records, and reports relating to the affairs of the Chapter.
- Ensure new members and initiates are properly recorded with Sigma Pi Fraternity
  - See [OmegaFi Vault](#)
    - [Watch Tutorial on OmegaFi Vault](#)

**The First Counselor (“Sergeant-at-Arms”)** shall serve as the warden and sergeant-at-arms, and perform such duties as enforcement of dequorum in chapter/colony meetings.

**Responsibilities:**

- Ensure order and decorum during Chapter/Colony meetings
- Serve as Alumni Secretary
- Implement a Judicial Committee System to ensure due process for members who violate chapter rules and policies
- Ensure the safety and security of of the Chapters Ritual Equipment, and make it available for appropriate uses only

**The Herald (“Historian”)** shall serve as the Historian of the Chapter/Colony, and perform such duties as maintaining a history book of the chapter highlighting and showcasing its history.

**Responsibilities:**

- Keep historical records of the chapter
- Collaborate with the First Counselor to develop and implement an Alumni Newsletter and Recognition Program
- Ensure the Ritual of Sigma Pi Fraternity is performed correctly and respectfully during the opening and closing of Chapter Meetings, pledging and initiating of brothers and installation of officers.
- Oversee a Public Relations program
- Meet deadlines for submissions to Sigma Pi for publication purposes in The Emerald
- Partner with the Secretary to properly maintain records of the Chapter Bylaws and reports

Upon the expiration of their terms, officers and committee chairs of the Chapter/Colony shall turn over to their duly elected or appointed successors all books, records, correspondence, or other matters pertaining to his office or to the Chapter. It is advisable that the Chapter/Colony conduct an Officer Transition Retreat to provide for seamless transition.

# Committees

Committees are a great way for officers to separate duties and engage members to be involved in the business of the Chapter/Colony. These can be by appointment or vote, and should allow all members the opportunity to be involved where they have a passion and can add value.

## Recommendations:

- Scholarship
- Finance
- Standards
- Marketing
- Recruitment
- New Member Education
- Philanthropy
- Founders Day
- Orchid Ball
- Intramurals

## Committee System Example

### Scholarship Committee

- Chairman appointed by the Sage or elected by Chapter/Colony
- The chairman should have at least a junior standing and should have a good academic record

### Committee Members: 3-5 Members

- Committee Members selected by Chairman or other method

### Powers and Duties

- Schedule Study Hours for the Chapter/Colony
- Collaborate with Student Support Services Office (or comparable) on campus to help brothers who are struggling
- Oversee awards program for outstanding Scholarship

### Recruitment Committee

- Chairman appointed by Sage or elected by Chapter/Colony
- The Chairman should have the ability to manage and lead a team and meet recruitment goals
- The Chairman should have understanding of how to use a database system as Sigma Pi has provided ChapterBuilder for recruitment program management

### Committee Members: 3-9

- Committee Members selected by Chairman or other method

### Powers and Duties

- Develop and Schedule Recruitment Events
- Develop and manage committee budget
- Oversee the bidding process for new members

Upon the expiration of their terms, officers and committee chairs of the Chapter/Colony shall turn over to their duly elected or appointed successors all books, records, correspondence, or other matters pertaining to his office or to the Chapter. It is advisable that the Chapter/Colony conduct an Officer Transition Retreat to provide for seamless transition.



## Fraternal Excellence

Each Chapter of the Fraternity will strive to maintain minimum standards in areas not limited to but including citizenship, awareness, leadership, and brotherhood. Sigma Pi Fraternity has a recognition system wherein Chapters and members have the opportunity to earn awards for highlighting the success and brand of Sigma Pi in your community and on your campuses.

### Chapter Awards

- Grand Sage Cup: Top Chapter in Each Tier
- Grand Council Award: Top Three Chapters per Tier
- Grand Chapter Award: 80% of Better on Chapter Report Card
- Most Improved Award: Greatest Overall Improvement
- William J. Cutbirth Award: Most Noteworthy Philanthropic and Community Service Projects
- Louis Foley Award: Best Undergraduate Chapter Newsletter
- Byron R. Lewis Academic Cup: Highest GPA

### Individual Awards

- Harold Jacobsen Award: Outstanding Contributions and Leadership on Campus
- Michael P. Carey Award: Outstanding Leadership within the Chapter
- Cletus A. Broecker Award: Outstanding Community Service
- Greek Advisor Award: Outstanding Campus Fraternity/Sorority Life Advisor, as deemed merited

As noted above, Sigma Pi uses a Tier System for certain top awards. Those tiers are based on the number of IFC Fraternities on the campus of origination.

- George Martin Patterson (Tier 4): 1-5 Fraternities on Campus
- James Thompson Kingsbury (Tier 3): 6-9 Fraternities on Campus
- William Raper Kennedy (Tier 2): 10-19 Fraternities on Campus
- Rolin Rosco James (Tier 1): 20 or more Fraternities on Campus

See the Chapter Report Card at [sigmapi.org/reporting](http://sigmapi.org/reporting) and the Awards Application at [sigmapi.org/fraternity/awards](http://sigmapi.org/fraternity/awards) to better help your planning meetings as you seek to be the top chapter on your campus and within the Land of Sigma Pi..



**SIGMA PI**

## Activity that Jeopardizes Chartered Status

If the Chapter or its members violate the law or the rules and regulations of the host school or the Fraternity or the Fraternity's Standards, the Chapter runs the risk that the Fraternity will exercise its rights to terminate the charter or to terminate the individual's membership. The responsibility to avoid these violations is the Chapter's and each of its members. Any hazing of new members as a condition of membership or a "hell week" are types of activities which violate the Fraternity's Standards. If those events occur, they are done against the Fraternity's Standards and could subject the Chapter to loss of its charter and individuals to potential civil and criminal liability. Such violations are most often the result of an aberrational individual conduct of a member which is not authorized by the Chapter and is contrary to the Fraternity's Standards.

Alcohol or drug abuse or violation of any applicable statute, regulation or law regarding the same; sexual abuse or the commission of crimes or violation of school rules and regulations or statutes and ordinances of the city, county or state where the Chapter is located; or violation of federal law can result in the loss of the Chapter's charter and the potential loss of membership for the responsible individuals.

See Sigma Pi Policies, Constitution, and Bylaws at

[sigmapi.org/fraternity/about-sigma-pi/policies-constitution-bylaws](http://sigmapi.org/fraternity/about-sigma-pi/policies-constitution-bylaws)



**SIGMA PI**

## Chapter/Colony Financial Obligations

Sigma Pi Fraternity invoices Chapters and Colonies for semi-annual dues, new members and initiation fees. Semi-Annual Dues are prepared based on the number of total members on the official chapter roster. In order to assist in your preparation of your budgets we will highlight the membership dues program and what it provides for. Every Chapter and Colony has the autonomy to set their own dues structure as long as they are able to meet Sigma Pi dues and fees in a timely manner. Sigma Pi will work with Chapters and Colonies to advise on budgeting and financial management as needed or requested.

*\*As of 2020 the average membership dues charged locally per chapter was \$668 per member*

Sigma Pi New Member and Initiation Fees		SigmaPi Semi-Annual Dues
<p><b>New Member Fees: \$75</b> Due within 10 days of ceremony <i>*Late fees may apply</i></p>	<p><b>Initiate Fees: \$325</b> Due within 10 days of ceremony <i>*Late fees may apply</i></p>	<p><b>Fall 2021</b> <b>\$265 per member</b> Based on Total Roster as of September 15  <b>Invoiced on October 1</b></p>
<p>Once reported, New Members will be entered into the Bayard Membership Experience program to begin their new member education. <b>New Members cannot initiate until they complete the Bayard Membership Experience and the Tightrope modules</b> <b>New Members are expected to be initiated within six weeks of pledging</b> <i>(*If your campus or IFC has other parameters, contact the Executive Office)</i></p>		<p><b>Spring 2022</b> <b>\$265 per member</b> Based on Total Roster as of January 15  <b>Invoiced on February 1</b></p>

*\*Sigma Pi Membership dues and fees are subject to change per the Bylaws of Sigma Pi Fraternity.*

### Membership Dues Program

Sigma Pi Fraternity is a private men's membership organization, conducting business as a 501C7 non-profit organization. The membership dues program is based on total roster number and they provide the financial resources to conduct business operations and invest into mission development initiatives highlighted below.

### Benefits & Resources

- Advice and suggestions on such practical matters as the operation and management of a Chapter, the management of Chapter finances, recruitment of membership, scholarship, athletics, philanthropy, risk awareness for Chapter events and educational guidebooks.
- Membership education programs, Chapter officer leadership seminars and other self-development programs.
- Guidelines for the Chapter's initial organization with suggested provisions, which contain alternatives for the Chapter's decision and use.
- Access to educational resources, including guidelines and assistance in obtaining speakers.
- Chapter consultants who are available to talk and correspond with Chapter officers about questions in the





areas of Chapter administration and any problems or concerns.

- Assistance in the initial recruitment of prospective members for a new Chapter and additional assistance in the Chapter's ongoing recruitment efforts.
- Receipt of the Fraternity's biannual publication, *The Emerald*.
- Receipt of the Fraternity's e-newsletter, The Sigma Pi Quarterly
- Assistance in alumni association organization and operations.
- Awards and recognition of Chapters for achievement in campus leadership, scholarship, intramural athletics and overall performance.
- Invitation to attend leadership conferences for undergraduate student leaders and interested alumni and other advisors to the Chapters.
- Assistance in developing community service programs in public relations.
- Guidance in selection and consultation with various advisors, including alumni advisors, resident advisors and faculty advisors.
- Assistance to the Chapter and its alumni and other interested persons to obtain housing, including an opportunity for lease guarantees which meet prudent business standards.
- Guidance to the Chapter's members in applying for educational grants and scholarships, subject to availability.



## Annual Reporting Deadlines & Online Resources

Sigma Pi Fraternity does expect chapters to submit regular reports to provide updates on how the chapter is doing. This information allows Sigma Pi to evaluate the operations and engagement of the chapter on their campus, in their community and with their alumni.

**Quarterly Reports:** Provides the Chapter officers the opportunity to share information on the operations and activities of the chapter/colony

- September 10
- January 10
- March 10
- June 10

**Rosters:** In order to ensure proper invoicing and have a record of the chapter/colony membership

- September 15
- January 15
- June 15

**Volunteer Evaluation Report:** Provides information Sigma Pi uses to evaluate the volunteer program

- December 10
- May 10



**SIGMA PI**

## Officer Transition Modules

The Officer Transition Module gives you an introduction to your role, the policies of the Fraternity, and understanding the composition of your executive board. This module is complementary and is for new officers or officers entering into a new role. Instructions

Below are instructions for logging in to Plaid's Learning Management System to create an account, and take the modules.

1. We highly recommend using the Google Chrome browser because there are known compatibility issues with both Internet Explorer and Safari.
2. Visit **mysigmapi.com** and log in using your username and password.
3. Click on "Online Learning"
4. In order to complete the Module, you must turn off your pop-up blocker or allow pop-ups from beingplaid.com.
5. After logging in, you must first click on "Plaid Learning Center", select "Course Catalog" and enroll in your respective course.
6. Once you have enrolled in the courses, click on "Plaid Learning Center", select "Your Enrollments" and select "View" next to the name of your course.
7. Click the link "Launch Course" next to the name of your course to begin the program. It may appear in a new window depending on your browser settings.
8. Email [support@beingplaid.com](mailto:support@beingplaid.com) if you have questions or trouble with any of these tasks.



**SIGMA PI**

# New Member Education

## Anti-Hazing Policy

Hazing is contrary to the creed, standards, ideals, mission, and goals of Sigma Pi Fraternity and such activity by our members is hereby prohibited. No chapter shall encourage or conduct hazing activities. Permission or approval by a person being hazed is not a defense. Hazing activities are defined as:

*“Any action taken or situation created intentionally, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment or ridicule. Such activities may include but are not limited to the following: use of alcohol, paddling in any form, creation of excessive fatigue, physical and psychological shocks, quests, treasure hunts, scavenger hunts, road trips or any such activities carried on outside or inside the confines of the chapter house, wearing of public apparel which is conspicuous and not normally in good taste, engaging in public stunts and buffoonery, morally degrading or humiliation games and activities, and any other activities which are not consistent with fraternal law, ritual or policy or the regulation and policies of the educational institution.”*

In order to provide a uniform knowledge system, Sigma Pi Fraternity has developed an online education platform so that all new members across North America are learning the same information as they matriculate through their new member program.

## Bayard Membership Experience

New members when properly registered with Sigma Pi are automatically enrolled in this program. New Member Educators should have undergone training prior to implementing a new member education program.

The program includes interactive modules and resources that will serve as a means to reaffirm the policies, expectations, and education for members of Sigma Pi when it comes to drugs and alcohol, sexual misconduct, hazing, and mental health.

You'll also find access to Plaid's Tightrope program on the LMS platform. This is expected to be completed by ALL new members moving forward.

**All new members are expected to be initiated within six (6) weeks**

If your college, university or IFC has different policies you will need to remit those to the Executive Office of Sigma Pi for review and verification. Chapters who do not adhere to this policy shall be subject to disciplinary measures including but limited to: suspension or charter revocation.

## New Member Education on Chapter History and Expectations

Sigma Pi Fraternity believes each chapter shall develop its own education program to prepare new members to be productive members of their Chapter. The Bayard Membership Experience is not intended to take away from that, but rather to subsidize and add more value to new members.



**SIGMA PI**

## Member Financial Indebtedness

There are times in which a chapter/colony member may be unable to meet the financial requirements involved with being a member. The bylaws of Sigma Pi Fraternity outline matters pertaining to suspension and expulsion for financial indebtedness when a member has not paid the chapter/colony. It is important to note that Sigma Pi invoices the chapter/colony for membership dues based on roster size. If a chapter/colony decides to grant a member a financial assistance plan to a member, the Chapter/Colony is still responsible for paying the full invoice from Sigma Pi Fraternity.

The information below provides a sample process that can be developed to help maintain financial accountability, dues payments and cash flow for the Chapter/Colony.

### Sample Financial Suspension Process

#### 1. 30 Days Past Due: Social Probation

- a. In the event that an Active brother's debt becomes thirty (30) days past due, his Chapter may choose to place him on social probation for a period of thirty days
  - i. Probation means he can attend Chapter/Colony Meetings, ritual ceremonies and Philanthropy & Community Service events, but is ineligible for social events and intramurals

#### 2. 60 Days Past Due: Suspension

- a. In the event that an Active brother's debt becomes sixty (60) days past due, said member is to be placed on suspended status for a period of thirty (30) days
  - i. Suspension means he can attend chapter meetings only

#### 3. 90 Days Past Due: Recommendation for Expulsion

- a. In the event that an Active brother's debt becomes ninety (90) days past due, said member is to be recommended for expulsion from the Chapter/Colony

It is important to note that as a self-governed group, you have the ability to determine these processes for your Chapter/Colony. It is recommended that they be approved by vote of the members and noted in the Chapter Bylaws and Policies.

### Notice of Suspension

In the case of financial suspension written notice to the indebted brother shall reasonably inform him that suspension has occurred and that such brother will therefore lose his good standing in the Fraternity, will not be permitted to wear his badge, letters, crest or name; or join as a brother in any function, procession or display, public or private, of the Fraternity.

- Notification of length of suspension shall be mentioned in this Notice of Suspension. Unless prohibited by valid contract, he shall no longer be permitted to live in the Chapter House.
- A copy of this Notice shall be immediately sent to the Executive Office of Sigma Pi Fraternity for record keeping purposes.



**SIGMA PI**

## Financial Expulsion

There are times members are expelled from the Chapter and Sigma Pi Fraternity for financial indebtedness.

See Bylaw 4 Section 2.

## Payment and Reinstatement

In the event that an Active brother has been expelled from the Fraternity for Financial indebtedness, he may petition his Chapter in writing for reinstatement within one (1) year from the date of the filing of the recommendation for expulsion, unless otherwise defined by Chapter Bylaws.

Any indebtedness of the former member must be paid in full before reinstatement is voted upon.

Upon a Chapter vote to reinstate the former member, the Chapter shall immediately submit a written request to the Executive Office confirming the payment of debt by the person in question and Chapter vote on the matter. Such requests to reinstate the member will be presented to and require approval from the Grand Council.



## Programs and Conferences

Sigma Pi Fraternity seeks to meet our mission of inspiring, promoting and supporting the lifelong development of our brothers by providing various conferences, workshops and educational programs for our members. It is recommended that your chapter also develop speaker series and educational programs for your members to help meet the mission.

### Sigma Pi Programs



- Convocation: All Brothers and Guests
- Mid Year Leadership Conference: Chapter Officers
- Tony Siress Leadership Summit: Rising Sophomores and Juniors
- Province Workshops: All Chapter/Colony Members
- Bayard Membership Experience: New Members
- Back to School Summit: Chapter Officers and Select Committee Chairmen
- Tightrope (Health & Safety): New Members

Sigma Pi Fraternity from time to time will charge a registration fee for programs. When fees are assessed, the Chief Executive Officer seeks to keep registration costs as economical as possible, while also providing a world-class educational program to inspire, promote, and support the lifelong development of our brothers. For programs that include registration fees, those will be posted in the registration process.

Sigma Pi Fraternity does seek grant support from the Sigma Pi Educational Foundation and Sigma Pi University to help subsidize various programs. These funds are provided by charitable support from alumni, friends and parents of Sigma Pi.

### Recommended Chapter Programs

- Scholarship Program: Highest GPA Award
- Career Nights: Alumni Engagement and Networking
- Speaker Series
  - Financial Management
  - Health & Safety
  - Resume Writing
- Ritual Workshops



## Chapter Educational Funds

In response to alumni demand for a tax-deductible option to provide financial support to their local chapters, the Sigma Pi Educational Foundation (SPEF), in consultation with Sigma Pi Fraternity, has developed the Chapter Educational Fund (CEF) Program.

Unlike the Foundation, local chapters and housing corporations are not tax-exempt under section 501 (c) (3) of the Internal Revenue Code. As such, alumni that provide direct financial support to local chapters and housing corporations are not permitted to receive the benefit of any tax deductions. The CEF Program allows donors to make charitable gifts that specifically and directly address the needs of their local chapter.

The alumni members of any active or dormant chapter (including the members of any colony) of Sigma Pi Fraternity are welcome to establish a CEF with the Foundation. The Foundation will manage all gifts to the CEF as restricted gifts for the sole benefit of the chapter and its members. Learn more about starting a CEF for your chapter with the [CEF Information Packet](#).



**SIGMA PI**



## Removal of Chapter Officers

Unfortunately, there are times in which the Chapter/Colony has determined that new leadership is needed and a vote of confidence is needed. It would be beneficial to have a process outlined in your Chapter/Colony Bylaws/Policies to ensure for cause and due process are properly noted and followed. Below will outline a sample process, please remember, this is for informational purposes only:

### Chapter Decision

- Motion must be made at a regular or special meeting by a member in good standing and duly seconded
  - A majority vote (50+1) would be required to bring up the discussion
  - A minimum of seven (7) days but no more than fourteen days postponement shall be provided to give the the officer in question an opportunity to defend himself
- Final vote shall require a three-fourths ( $\frac{3}{4}$ ) vote in order to pass
- Roster Updates and Notification must be submitted to Sigma Pi Fraternity within three (3) days



**SIGMA PI**

## Media Protocols

The Executive Office is the primary point of contact regarding all media inquiries directed toward Sigma Pi Fraternity, and the Executive Director serves as the spokesperson for the Fraternity.

If the media should contact the chapter/colony, the following statement should be shared:

**At this time, any inquiries can be directed to our Executive Director Jonathan Frost at [jfrost@sigmapi.org](mailto:jfrost@sigmapi.org). Thank you.**

Here are a few suggestions to keep in mind:

- Be courteous to any reporter who contacts you.
- Avoid “no comment” as it leads to speculation. Instead make a simple statement such as the one outlined above.
- Avoid wearing Sigma Pi letters during the next few weeks of media scrutiny.
- Please email your Chapter Support Team Member regarding any media inquiry. Try to determine the reporter’s name and news outlet if possible.
- Refrain from commenting/posting on social media about the situation.



**SIGMA PI**