

# **ARCHON'S 2010 QUICK REFERENCE GUIDE**

I. Essential Resources .....	2
II. The Duties of the President .....	6
III. Making Friends and Influencing People at the International Office .....	10
IV. Completing the Chapter Membership Reports .....	14
V. 2009-2010 Psi Upsilon Officers' Calendar.....	16
VI. Things Easily Overlooked .....	18

## **I. Essential Resources**

Over the years comprehensive guides have been created to assist chapter presidents and other key chapter officers perform their duties. The resources listed below may be downloaded at the Psi Upsilon web site, [www.psiu.org](http://www.psiu.org). Click on the link for "Undergraduates" and then "Officer Handbooks."

The successful archon must be familiar with all of the following materials and resources. It is important to become familiar with each of these resources so you can understand and help facilitate the success of other officers and members of Psi Upsilon.

### **Garnet Book: Chapter Operations Guide**

This guide to chapter operations is your bible. It covers the following topics in detail: leadership and motivation; Constitution and by-laws; officers' responsibilities and parliamentary procedure; the Psi Upsilon Membership Program (PUMP); chapter programming; chapter standards; crisis and risk management; and the operation and organization of the International Fraternity.

### **Gold Book: Ceremonies of Psi Upsilon Fraternity**

Contents of the Gold Book includes: General ritual instructions; Chapter Meeting Ceremony; Founders' Pledge Ceremony; Big Brother Ceremony; Formal Initiation Ceremony; The Covenant; Adamantine Chain Ceremony and Senior Charge; Installation of Officers; and Memorial Service.

### **The Psi Upsilon Risk Management Program**

This handbook covers topics on alcohol and drugs, hazing, sexual abuse, fire, health, safety, and education. Also, it covers our enforcement policy and what to do as the president if a situation arises.

### **The Psi Upsilon Fraternity Web Site:**

Our web site at [www.psiu.org](http://www.psiu.org), can be the most useful resource you have during your undergraduate fraternity career. It contains an up-to-date calendar of events, copies of the resources listed here for you to download, scholarship and job applications, and many other topics of interest. All chapter reports can be completed online as well. Every chapter officer should be familiar with its contents and visit the site several times a month.

## **The College Tablet**

Our member education handbook is provided to every Psi Upsilon pledge. It is a great “quick reference” guide to the Fraternity’s history and heritage, chapter roll, Fraternity organization, risk management, and other useful Psi Upsilon information. It can also be a useful “brush-up” tool for members to reacquaint themselves with Psi Upsilon history during recruitment.

No chapter president can, or should, try to do it all by himself so he must make sure that his chapter officers have access to the following resources:

### **Treasurer**

#### **Handbook for Chapter Finances**

This manual is a valuable tool for the chapter treasurer to ensure that budgets are set and adhered to, to prevent financial emergencies, and to ease the transition between treasurers.

### **First Angelos**

#### **PUMP (Psi Upsilon Membership Program)**

**PUMP** discusses the benefit of member integration over pledge education, offers a calendar of events for member integration, and describes several different educational and brotherhood building activities.

#### **The College Tablet**

### **Recruitment Chairman:**

#### **Handbook for Membership Recruitment**

The Handbook for Membership Recruitment shows the importance of recruitment over the traditional “rush” practices. It also gives the recruitment chair tips for organizing recruitment events, motivating chapter members to participate, and has some sample recruitment workshops that can be performed for the entire chapter.

## **Scholarship Chairman**

### **EXCEL: Excellence in the Classroom, Excellence for Life**

**Excel** covers topics from the role of fraternity in academics to obtaining a faculty advisor. Additionally, it provides the know-how for setting up scholarship committees and making it all happen.

Additional major resources include:

### **Handbook for Public Relations**

The public relations manual provides positive programming ideas to improve the public image of fraternities, particularly our own Psi Upsilon.

### **Handbook for Alumni Associations**

A strong alumni association is vital to the health of an undergraduate chapter and this handbook can help to form a new alumni association or revive a struggling one.

### **Retreat Facilitators Guide**

A retreat can make the difference between a mediocre and a good year for a chapter. This guide gives the retreat facilitator a clear outline for planning a good retreat, including sample schedules and motivational material.



## II. The Duties of the President

As chapter president, you are a leader, a planner, a pacesetter; the chief elected officer of the chapter, or in management terms, the CEO, responsible for not only its operations but also its personnel. Such responsibility includes seeing that every area of operation runs smoothly and that the members in charge of each area perform their duties.

You may never file a monthly financial report, but you are just as responsible for the figures on it as the treasurer. You may never write a fraternity education program or draw up a membership recruitment calendar, but if these are not done, it is a reflection on your job as chapter CEO.

Your responsibility also includes setting the pace for the chapter through your actions and preparation. You must determine the goals to be attained, communicate them to the chapter, and convince the members to cooperate with you in achieving these ends.

As the chief executive, you will be exposed to many people from outside the chapter -- presidents of other fraternities, the IFC, campus organizations, school officials, and alumni, to name a few. In the past, you were responsible solely for your personal conduct. You now answer for the conduct of the entire chapter.

### **Checklist of Presidential Responsibilities**

1. Become familiar with all areas of chapter operations, including knowledge of the duties of each officer. Appoint non-elected officers. Read the chapter by-laws and the Constitution of Psi Upsilon Fraternity. Review *The Garnet Book: Guide to Chapter Operations*.
2. Periodically review the responsibilities of each officer and evaluate his performance. Along with officers, plan overall chapter goals and evaluate their attainment.
3. Become familiar with all areas of the International Fraternity, including its officers, staff, programs, and services.
4. Review the relationship with the International Fraternity, including representation at international meetings, special educational programs, and the promotion of inter-chapter visits through officer meetings and social functions.
5. Preside at meetings of the chapter and Executive Committee. Long meetings result in poor attendance. Prepared agendas are very helpful. Have officers prepare reports in advance and handle routine matters in the Executive Committee in order to expedite chapter meetings. All members should be invited to attend Executive Committee sessions to avoid the appearance of railroading and to broaden support.

6. Become familiar with *Robert's Rules of Order Newly Revised*, contained in *The Garnet Book*, to maintain order and decorum in chapter meetings. Meetings should be conducted at regularly scheduled times and places. At these meetings, summarize all the activities pertinent to the chapter.
7. Make all necessary reports to the International Office, the alumni, the IFC, and the college administration. Assure chapter compliance with all the requirements of the International Fraternity, alumni house corporation, IFC, and the college administration.
8. Develop a well-organized committee system with well-planned and publicized meetings. Coordinate and supervise all committees.
9. Involve members in committees through use of understudies to each officer. Include both seniors and pledges and provide awards for scholarships, athletics, and participation.
10. Train incoming officers by arranging meetings with outgoing officers. Gather detailed reports, (study manuals, by-laws, and other publications), from outgoing officers and present them to those incoming.
11. Serve as the representative of the chapter in all official capacities, including interaction with the fraternity advisor, the IFC, other fraternities and sororities, campus activities and intramurals. Act as a liaison with the community.
12. Sign all official correspondence and co-sign all checks. Answer letters and file required reports promptly. Read *The Diamond* and correspondence from the International Office.
13. Use the Psi Upsilon web site. It lists important upcoming events and reminders for all areas of chapter management, such as when membership reports are due, when to pay assessments, and when to turn in *Diamond* reports. Also, it contains information on Archons' Academy, Leadership Institute, Convention, scholarship applications, and information on job opportunities at the International Office.
14. See that the chapter treats all guests in a polite and proper manner. Protocol dictates that the president personally greets all guests when possible.
15. Possess a thorough knowledge of the initiation ceremony of Psi Upsilon so that it may be performed without error and carried out with proper dignity and respect both by officers and members.
16. Enforce house rules. Review disciplinary procedures assuring that they are understood and followed. Cover the enforcement of university, fraternity, and chapter laws. Be familiar with the risk management policies of the Fraternity.

17. Speak with inactive members. Encourage involvement through participation in other chapter programs, goals, policies, and committees. If this fails, invoke disciplinary procedures as provided for in chapter by-laws.
18. Maintain a continuity notebook with criticisms of chapter operations, lists of committees and their members, lists of all contacts, and an overall calendar.
19. Foster chapter harmony and efficiency by bringing the problem of cliques out into the open. Act on impending problems.
20. Set an example, in words and actions, for the entire chapter.
21. Lead, do not command. Act on the confidence and cooperation of the chapter members. Be aware of the dictator syndrome.



### III. Making Friends and Influencing People at the International Office

#### Communication

**Communication, communication, communication:** We have done everything we possibly can to make it easy to communicate with you. Essential courtesy in your relationship with Psi Upsilon's professional staff, as it is in the business world, requires you to return the calls we make to you.

**Telephone:** The easiest thing to remember is the International Office's phone number: **800-FYI-1833** (800-394-1833). If you ever have a problem with something or need some information, **call us**.

Mark Williams, <i>Executive Director</i>	Ext. 27
Mariann Williams, <i>Director of Alumni Services and Development</i>	Ext. 22
Tom Fox, <i>Director of Chapter Services</i>	Ext. 25
Mena Louies, <i>Chapter Leadership Consultant</i>	Ext. 24

**Voice Mail:** Every staff member has a voice mailbox, which is available for you 24 hours a day, 7 days a week. If it is an Emergency you can call Tom Fox on his mobile phone at 317-250-5378.

**E-mail:** Every staff member has an e-mailbox and each of us checks it frequently. Reports can be submitted electronically or faxed if you like.

Mark Williams	maw@psiu.org
Mariann Williams	mariann@psiu.org
Tom Fox	tfox@psiu.org
Mena Louies	mlouies@psiu.org

**Web site:** [www.psiu.org](http://www.psiu.org)  
[www.psiu175.org](http://www.psiu175.org)

**Fax:** 317-844-5170

**Postal address:** Psi Upsilon Fraternity  
3003 East 96<sup>th</sup> Street  
Indianapolis, IN 46240-1357

## Membership Reports

It is required that every chapter must submit personal information for each of its members and keep this information up to date. We ask for the following information Home address, Home phone number, year in school, email address and date of birth. We also require that the address and phone number be home, and not school, numbers.

**Initial Membership Report:** The Initial Membership Report is due on October 1<sup>st</sup> of each academic school year. (Reports and assessments from chapters that start classes after September 15<sup>th</sup> are due October 15<sup>th</sup>.)

**Pledge Reports:** Pledge reports are due upon the closing of the pledge class and the start of the pledging period. **You will find an on-line Pledge Report at the Psi U web site.** College Tablets and pledge pins for each pledge will be mailed upon receipt of the Pledge Report.

**Mid-year Membership Report:** This report is due **February 1<sup>st</sup>** after your winter break. It informs us of any necessary adjustments we need to make in the database for those undergraduates studying abroad and any pledges that were initiated in the fall.

**Graduate and Initiate Report:** Many times, this is the easiest report to overlook, but unfortunately may be the most costly to your chapter as it pertains directly to assessing risk management premiums for the following fall. If you do not let us know who graduates, we have to assume that no one did graduate. Since membership numbers for the following year are due to our insurance carrier by the end of June, it is essential that we have this report by its due date of **May 1<sup>st</sup>**. Again, we use these membership numbers to help us figure out how much your chapter will owe for insurance. Do your chapter a favor and turn it in by the due date.

## Assessments

**Taxes:** The taxes are due with the Initial Membership Report. The per member tax for 2009-10, as determined by the 166<sup>th</sup> Psi Upsilon Convention, is \$160. The easiest way to determine how much your chapter owes is to fill out the Initial Membership Report and multiply the number of active undergraduates by the per capita tax.

**Risk Management Assessment:** An invoice is sent out at the end of August with information on the Risk Management Assessment. Early payment is due in the third week of September and receives a 5% discount. Regular payment is due no later than October 1. **If your premium and taxes are not paid by October 10, 2009 your insurance will be canceled and a 25% surcharge for reinstatement will be added.** The invoice amounts are determined by the numbers submitted on your Graduate and Initiate Membership Report, whether or not you have a house, and your chapter's risk management compliance record.

**Membership Fees:** A membership fee of \$210 is due upon initiation. Payment of the initiation fee is a condition of membership in Psi Upsilon. When the membership fee is received at the International Office, badges and certificates for the new initiates will be ordered. Badges will **not** be provided for those whose initiations are not reported or the membership fee is not paid by June 30, 2010.

**Chapter services:** The 160<sup>th</sup> Convention voted to establish a Chapter Services assessment to be paid by each chapter in two installments of \$900.00 each. The first installment is due on November 1<sup>st</sup> and the second installment is due on March 1<sup>st</sup>. This assessment covers the supplies and services that are provided by the International Fraternity. This also covers the necessary registration fees and hotel accommodations for two undergraduate delegates from your chapter to our annual Convention. This assessment must be paid, and will not be refunded, regardless of whether your chapter attends the Convention.

## **Other key items**

**Chapter Reports:** Reports are due on the first days of November and March. They include your chapter's accomplishments during the academic school year to date. This is a great opportunity to catch your alumni's attention on your chapter's outstanding achievements each semester. The reports are published in *The Diamond*, are used for our online newsletters, and are reviewed by our awards committee at the Convention.

**Convention Reports:** The Psi Upsilon Constitution requires each chapter to report to the Convention its activities and accomplishments for the year. The report is due on May 1 and is similar to chapter reports except that they should summarize the entire academic year.

**Officer Reports:** There are officer reports available online that should be filled out for the beginning of every term.



## IV. Completing the Chapter Membership Reports

Obtain a Membership Report of your chapter's non-alumni members by entering your last name, personal member ID number and chapter password and selecting your chapter from the pull down menu. Select the Membership report you would like (Initial, Mid-year, or Graduate and Initiate) and click on the "Generate Report" button.

Verify each person's information. If any information is incorrect or is omitted please get the correct information and enter it.

**Please be sure to fill in the following fields:** Name, Home (not school) address, Home phone number, email address, birthdate, and Initiation date (if applicable).

The following is an explanation of the "type" field found to the left of the member's name:

"P" = Pledges

"N" = Initiates since July 1, 2009 (**Be sure to include initiation date!**)

"U" = Active Members initiated before July 1, 2009

"I" = Not enrolled in classes or studying abroad.

"A" = Alumnus (or if someone has permanently left the school list them as alumnus)

"D" = Expelled after initiation

"X" = Depledged prior to initiating

"Q" = Uninitiated Alumnus (graduated prior to provisional chapter gaining full chapter status)

The report is in alphabetical order by year of graduation. If a member's expected graduation date has changed, please make the correction.

To update someone's information, click on his name and make changes in the appropriate field. Be sure to click the "Submit to Psi Upsilon International Office" or changes won't be received.

Once the members' records have been updated, it is recommended that you generate a membership roster and print it out for your records. Then return to the reports form and select Summary Sheet for the Membership Report you have just completed. Print and complete the Summary Sheet. Then mail the completed Summary Sheet and any assessments that are due to the International Fraternity at:

Psi Upsilon Fraternity  
3003 East 96th Street  
Indianapolis, IN 46240-1357

You do not need to send the list of members generated in the Membership Report. Any information that you updated will be automatically emailed to the Psi Upsilon International Office.

For your convenience there is also a Full Roster you can generate from the reports web page in case you are ever in need of one. Having a completed roster while filling out the membership report will often help you complete the report quicker and more thoroughly.

If you have any questions, please call us at 800-394-1833 or email [tfox@psiu.org](mailto:tfox@psiu.org).

## V. 2009-10 Psi Upsilon Officers' Calendar

### September, 2009

**20** Insurance assessments due to receive 5% early payment discount.

### October

**1** Insurance assessments due.

Initial Membership Reports and Taxes (\$160.00 per returning member) due.  
Membership (initiation) Fees are due upon initiation (\$210.00 per initiate).  
(Reports and assessments from chapters that start classes after September 15<sup>th</sup> are due October 15<sup>th</sup>.)

Fall Officer reports are due

**10** **Insurance coverage canceled if payment not received. There is a 25% surcharge for reinstatement.**

### November

**1** First installment of Chapter Services assessment (\$900) due

Fall Chapter Report due

### January, 2010

**8-10** **Archons' Academy** – Indianapolis, IN

### February

**1** Mid-year Membership Reports due and taxes for returning students due  
Membership (initiation) fees are due upon initiation (\$210.00 per initiate)

Spring Officer reports due

### March

**1** Foundation scholarship applications due

Final installment of the Chapter Services assessment (\$900) due

Spring Chapter report due

**April**

- 1** Outstanding Junior nominations due
- 15** Griffin Award for Senior Excellence nominations due

**May**

- 1** Graduate and Initiate Membership Reports due
- Chapter reports for the 167<sup>th</sup> Convention due
- Registration for the 167<sup>th</sup> Convention delegates due
- Send summer contact info to International Office

**June 26 –**

- 29** 167<sup>th</sup> Psi Upsilon Convention and 2010 Leadership Institute – Champaign, Illinois  
**All chapters are expected to attend and send at least 2 delegates.**

\* Pledge Reports are due at beginning of formal pledging. If they are not received at this time College Tablets will not be sent to the chapter.

## VI. Things Easily Overlooked

### Awards

Have your Greek Affairs office submit your chapter's academic information at the end of each semester. During each Convention, those chapters that have met their financial obligations to the Fraternity and are in attendance at the Convention are eligible for the following awards:

*The Diamond Award* for the outstanding chapters.

*The Owl Award* for outstanding academic achievement.

*The Garnet and Gold Awards* for each chapter that achieves a grade point average greater than the all men's average for 2 consecutive semesters

*The Clasped Hand Award* for Community Service and Philanthropy.

*Award of Distinction* for outstanding achievement in a particular area or project.

*Distinguished Alumni Service Award* for alumni support of Psi Upsilon.

### Expansion

Help the International Fraternity expand to other colleges and universities by informing us of brothers who transfer or who have friends at other schools who are interested in Psi Upsilon. Likewise if there is a campus near you that you would like to mentor a colony of Psi Upsilon at please inform the International Office staff.

### Scholarships

The Psi Upsilon Foundation annually awards a number of \$500 merit based scholarships for brothers whose conduct demonstrates the highest moral, intellectual and social excellence. For the 2009-10 year, need based scholarships in amounts up to \$3,000 were awarded. Scholarship applications for the 2009-10 year are posted on the Psi Upsilon web site. Applications are due March 1, 2010.