



# PHI KAPPA SIGMA

CHAPTER UPDATE

MAY 2008

## OVERVIEW

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- II. Financial
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### I. Grand Chapter 2008 Registration

Grand Chapter 2008 will be held July 31<sup>st</sup> through August 3<sup>rd</sup> at the [Marriott Marquis Hotel](#) in Atlanta Georgia. Invoices for Chapter delegates were issued Friday March 14<sup>th</sup>. The Official Grand Chapter Registration website ([www.grandchapter.com](http://www.grandchapter.com)) is live! Look here for a copy of the [Grand Chapter Registration Packet](#).

### II. Financial

- A. **Form 990-N:** The IRS issued a [News Release](#) announcing the launch of a simple electronic filing system that small tax-exempt organizations may use to comply with a new law requiring them to file an annual electronic notice.
  - Click the [990-N link](#) for the form and filing instructions
  - Phi Kappa Sigma current Tax Year ends 7-31-2008 for all subordinate groups of which each Chapter is one.
  - Filing deadline for 7-31-2008 tax year is 12-15-2008 for tax information between 8-1-2007 and 7-31-2008!
  - This process should be noted in the Tau's Officer Manual for each chapter. Consult a Tax Attorney or a CPA for help in filling out the form. All chapters have Tax Ids and we have them on file at HQ. If you do not know your Chapter's, contact Deb at HQ.
- B. Payments are past due for invoices recently issued (January 16, 2008) for **Chapter Assessment & Grand Chapter Assessment**. Penalty rates have now been applied. For more information concerning fees, download the [2007-2008 Phi Kappa Sigma Fee Schedule](#).
- C. The [2008-2009 Phi Kappa Sigma Fee Schedule](#) and [Version 2 of the Estimates for the 2008-2009 Liability Insurance](#) are available. Please review your Chapter's information for accuracy. Please update your Chapter's roster, submit Fall 2007 grades, pay any outstanding debt, etc. beforehand so that we may provide your group with an accurate insurance estimate.

### III. Deliverables

The following items are due to the [International Fraternity](#). Also, don't miss other [Important Dates](#) that will occur later this semester. Any Chapter deliverables for the Month of May are due by June 1, 2008.

- A. **The Fall 2008 Projected Roster** with updated contact information (please remember to fill out all fields) is needed. The information provided by you, our Chapters is crucial to ensuring accurate billing for Insurance and Undergraduates fees for Fall of 2008. Please contact the International HQ for previous chapter rosters if needed.
  - [Sample Chapter Roster Template](#)
- B. [Neal Hosper's Outstanding Undergraduate Award](#) is due immediately. Nominate a brother today!
- C. **Spring 2008 Semester Grades**
  - Submit your Spring 2008 semester grades (*Required for MCS points and possible insurance credit*)
- D. **Fall 2007 Officer Reports/ Spring 2008 Officer Goals**
  - [Sample Officer Transition Sheet Template](#)
  - [Sample Officer Report Sheet Template](#)
- E. **January, February, and March and April Chapter Meeting Minutes**
  - [Sample Meeting Minutes Template](#)
- F. **Financials**
  - **Spring 2008 Chapter Budget**
    - [Financial Management Tool](#)
  - **January, February, March 2008 Financial Statements**
    - [Sample Balance Sheet Template](#)
    - [Sample Income and Expense Template](#)
- G. **Submit any proposed additions or modifications** of the "Pillars Program" for approval.
  - [4 Week New Member Program](#)
  - [6 Week New Member Program](#)
  - [8 Week New Member Program](#)

#### **IV. Mitchell Chapter Standards**

**The Mitchell Chapter Standards** report for the 2007-2008 Academic year is due to the International Fraternity Headquarters by **June 15, 2008**. Hopefully, your Chapter has begun the process of collecting and updating all of the information required to put together the report. If not here are some helpful tips to ensure a strong completion.

- A. If you haven't yet, make sure to draft a brief letter outlining to your Greek Advisor the various points you are asking him or her to verify.
- B. Go through the report and delegate responsibilities to officers whose office oversees the particular points your Chapter is trying to achieve. For example, ask your Tau to put together the information for the Financial Section.
- C. Draft template letters to go out to Administration, Faculty, Advisors and other clubs/organizations on your campus so you're not constantly writing the same letter multiple times.
- D. Mitchell Chapter Standards is not a sprint! Make sure if you haven't started yet to get moving now. The biggest mistake a Chapter can make on MCS is waiting until the last minute. Poor performance can cost your Chapter. Remember, many chapter awards are based on MCS performance.
- E. Pick up the phone or email us! If your Chapter has concerns about a point or documentation requirements, let us know. We want to help. Chapters that ask questions usually do much better!

#### **V. Chapter House Summer Break Checklist (Thanks to our friends at Kirklin & Co.)**

With the end of the school year fast approaching, it is important that we properly prepare our chapter houses for the summer break period. The leading risks to a chapter facility during the summer break period are fire, theft, wind, vandalism, water damage, and hail. We are forwarding to you a *Summer Break Notice* that outlines how these losses can impact your organization. In order to minimize these risks, we are also sending you a *Summer Break Checklist* to complete. The *Checklist* covers both equipment and facilities will be useful whether or not your chapter house is occupied this summer. Please take time to review this *Checklist* and implement the recommendations:

- A. [Summer Break Notice](#)
- B. [Summer Break Checklist](#)

#### **VI. New Members/Initiation**

- A. **New Member cards and fees** (\$62 per new member) are due into the International Headquarters' office within two week's of your new members accepting their bids. If payment and new member cards are not received within this time frame, penalty rates apply. (*New member pins and Skull Sessions books are free of charge if payment is received within 2 weeks of bid acceptance, though the Chapter must place an order for these items. Shipping/handling not included.*)
  - [Phi Kappa Sigma New Member Form](#)
- B. **Initiation Fees** for your new members (\$225 per man) are due two weeks prior to Initiation in order to receive Membership Badges for distribution during the ceremony. If payment is not received within two weeks prior to initiation, penalty rates will be applied. (*New member cards and fees must have been received for any new member to be initiated.*)
- C. **Membership Agreements** are also strongly recommended for new members to sign and submit prior to Initiation.
  - [Membership Agreements](#)

#### **VII. UIFI Scholarships and Information (\$3,500 Available)**

- A. **The Phi Kappa Sigma Foundation has 7 \$500 dollar UIFI "Scholarships" available this year.** Can't make **Men of Honor** in the Winter? UIFI is the next best thing! In order to receive the "scholarship", you must first apply via the [NIC UIFI Website](#), and then acknowledge your registration acceptance to the International Fraternity Headquarters. Upon graduation, submit travel receipts up to \$65 and a copy of your graduation certificate. **YOU MUST PRE-PAY IN ORDER TO RECEIVE THE "SCHOLARSHIP"**.
  - [UIFI Informational Handout 1](#)
  - [UIFI Informational Handout 2](#)

## **VIII. Fraternity News**

- A. [Beta Lambda \(NIU\) Chapter Update Post Shooting](#)
- B. [Beta Lambda \(NIU\) Philanthropy Event, Caps4Sam](#)
- C. [Alpha Epsilon \(IIT\) Participates in HFH](#)
- D. [Gamma Gamma \(Carthage\) Chapter Shares Insight on Planning a Successful Alumni Event](#)
- E. [Phi Kappa Tau Rider University Case](#)
- F. [UTexas, Fraternity Reach Agreement](#)
- G. [2 Former Frat Members to Serve Jail Time for Hazing, See News Video Here](#)
- H. [University Police Begin Hazing Inquiry](#)
- I. [OmegaFi Report](#)

## **IX. Phi Kappa Sigma Employment Opportunities**

- A. Looking for a great job opportunity after graduation? Know a brother who just graduated and is looking for great place to work? Get paid to travel the country, help your fellow brothers, and learn valuable business experience.
  - [Phi Kappa Sigma Employment Brochure](#)
  - [Phi Kappa Sigma Educational Consultant Application](#)

For more information regarding the International Fraternity,  
please visit [www.pks.org](http://www.pks.org) or email us at [staff@pks.org](mailto:staff@pks.org).

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