

PHIKEIA EDUCATION PROGRAM PROGRAM FACILITATION GUIDE

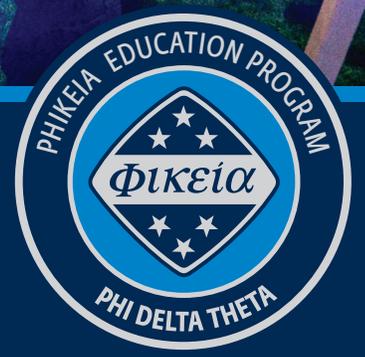


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STANDARDIZED PHIKEIA EDUCATION PROGRAM

WHAT TO EXPECT

SUMMARY

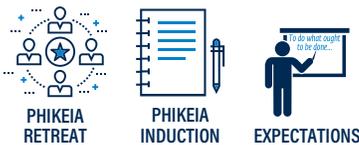
Data analysis suggests chapters participating in the pilot program retain members at a higher rate, are less likely to experience high-risk incidents, and are more committed to sustainable, healthy chapter operations. Recently, our General Council approved the standardized new member experience and requested all chapters and emerging chapters to transition to this new program. Chapters of Phi Delta Theta are expected to work toward fully implementing the Pikeia program. The program combines the *Manual of Phi Delta Theta*, in-person programming, and online education. This method has proven to provide the best-in-class launching point to the newest members of our organization.

WHY

- Provide a safer, experientially consistent, and more effective program
- Provide enhanced support for recruitment, brotherhood, philanthropy, and scholarship
- Collaborative with other chapters, GHQ staff, and volunteers to support new member leadership growth and accountability
- Help retain high quality members that become actively engaged in the chapter

TIMELINE

1. Pikeia Onboarding Week



2. Friendship Week



3. Sound Learning Week



4. Rectitude Week



Initiation and Acclimation



IMPLEMENTATION RESOURCES

- Chapters and emerging chapters recruitment chairman and Pikeia educator will receive facilitation training and resources to support recruitment and Pikeia education.
- Chapters will need at least one, but preferably more, volunteer(s) as active supervisors during the recruitment and Pikeia process
- Pikeia educators and recruitment chairman will be expected to provide updates on progress to their GHQ staff support through participation in the Chapter Accreditation Program and timely reporting.
- Chapters should be open-minded to the standardized program and focus on the new member acclimation period after initiation

PHIKEIA EDUCATOR RESOURCES



*I swear to inspire
and lead faithfully...*

THE PHIKEIA OATH

I now declare that I pledge myself and my services to the Phi Delta Theta Fraternity. That I will discharge faithfully the duties devolving upon me as a Phikeia, and that I will try to promote the welfare of the Fraternity, and that I will be always mindful of the basic principles of the Fraternity. And further, I pledge myself as a college man to uphold the honor and dignity of Phi Delta Theta, everywhere and at all times. I will never bring disgrace to this, my Fraternity, by any act of dishonesty or moral cowardice. I will stand firm for the ideals and sacred things of my Fraternity, both alone and with my Phikeia brothers. I will revere and obey the laws of the Fraternity, and do my best to incite a like respect and reverence in my Phikeia brothers and in every member of this chapter. I will strive in all ways to transmit the Fraternity to those who may follow after, not only not less, but greater than it was transmitted to me.

TEACHING MORRISON'S PHILOSOPHY

"To do what ought to be done, but would not have been done unless I did it, I thought to be my duty." —Robert Morrison

Give an example of how this quote relates to Phi Delta Theta's definition of "brotherhood" compared to "friendship."

What does Morrison's philosophy mean as the Phikeia educator?

What are some best practices to encourage our Phikeias to live by this principle?

Provide a list of activities that exemplify Morrison's philosophy.

Notes



PHI DELTA THETA
Friendship, Sound Learning, Rectitude

SEPTEMBER 2023

Sample Calendar

| SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY |
|---------------------------------|-----------------|---------|----------------------------------|------------------------|--|---------------------------------|
| | | | | | 1 Bid Extensions | 2 Phikeia Induction Ceremony |
| 3 Phikeia Retreat | 4 Meeting 1 | 5 | 6 | 7 Brotherhood Event | 8 | 9 |
| 10 Friendship Module Due | 11 Meeting 2 | 12 | 13 Brotherhood Event | 14 | 15 | 16 Big Brother Ceremony |
| 17 Sound Learning Module Due | 18 Meeting 3 | 19 | 20 | 21 | 22 | 23 |
| 24 Rectitude Module Due | 25 Meeting 4 | 26 | 27 Service/Philanthropy Event | 28 | 29 Exam Review Final Exam Module Due | 30 Initiation |

WEEK 1: PHIKEIAS ONBOARDING AND EXPECTATIONS

PHIKEIAS ONBOARDING OVERVIEW

HOUSEKEEPING:

- Phikeia educators will need to **plan ahead** to reserve any spaces on campus and communicate to the chapter, advisers, and speakers dates and times of all meetings for the Phikeias program
- Phikeias will create their myPhiDelt account
- Phikeias will sign the risk management and alcohol-free housing affidavit in myPhiDelt after authenticating account
- Phikeias will be given an overview of the process that will include:
 - Overview of the program
 - Chapter history
 - Contact information
 - Instructions for myPhiDelt and PDT U Online education modules
 - Checklist of expectations for Phikeias and members
 - Risk management policies

EXPECTATIONS:

The Phikeia educator will:

- Complete the induction ceremony
- Host the Phikeias retreat
- Enter Phikeias into myPhiDelt
- Begin building a mentor relationship with Phikeias and seeking big brother applicants
- Provide contact information for who they can contact regarding health and safety, mental health, finances, or academics

| EVENT INFO | RESPONSIBLE OFFICER(S) |
|---|---|
| End of recruitment | Recruitment chairman |
| Chapter vote of approval for Phikeias | Chapter meeting, CAB member |
| Bid distribution (dependent on university policy) | Chapter leadership |
| Induction ceremony | Phikeia educator, president, chaplain, treasurer, Phikeias, CAB member, and chapter |
| Retreat | Phikeia educator, potential big brothers, chapter leadership, adviser(s) |
| Meeting #1 | Phikeia educator, any presenters/speakers |
| Brotherhood event | Phikeia educator |

PHIKEIA INDUCTION CEREMONY

Slight pause

"To formally induct you to the position of a Phikeia of the (*your chapter designation*) Chapter of Phi Delta Theta, you will please stand and repeat the *Phikeia Oath* after me.

"I (*Phikeias state their full name*) now declare that I pledge myself and my services to ... the Phi Delta Theta Fraternity ... that I will discharge faithfully ... the duties devolving upon me as a Phikeia ... that I will try to promote the welfare of the Fraternity ... and that I will be always mindful ... of the basic principles of the Fraternity ... And further, I pledge myself as a college man ... to uphold the honor and dignity of Phi Delta Theta ... everywhere and at all times ... I will never bring disgrace to this, my Fraternity ... by any act of dishonesty or moral cowardice ... I will stand firm for the ideals and sacred things of my Fraternity ... both alone and with my Phikeia brothers ... I will revere and obey the laws of the Fraternity ... and do my best to incite a like respect and reverence ... in my Phikeia brothers ... and in every member of this chapter ... I will strive in all ways ... to transmit the Fraternity ... to those who may follow after ... not only not less ... but greater than it was transmitted to me."

PRESIDENT:

"Brothers, you have heard these men take the Phikeia oath and pledge their devotion to the Fraternity. What say you?"

CHAPTER MEMBERS RESPOND:

"We are witnesses"

The president calls the candidates forward one by one. The warden instructs each man to sign the Phikeia roll book or other information collection method. The chaplain shakes the hands of each Phikeia and directs him to the Phikeia educator. The Phikeia educator pins the Phikeia button of Phi Delta Theta on the Phikeia, hands him a Manual of Phi Delta Theta, shakes his hand, and directs him to return to his seat. All other Phikeias come forward, in turn, in a like manner.

PRESIDENT:

"You are now Phikeias of the (*your Chapter designation*) Chapter of Phi Delta Theta. Now, let me introduce to you, Brother (*Phikeia educator*), your Phikeia Educator, who assists and leads you on your journey to full membership in Phi Delta Theta."

The Phikeia Educator extends a short word of greeting to the group. You may announce the date, location, and main agenda items of their first meeting, as well as general expectations.

PRESIDENT:

"Each of you are now given the name "Phikeia." Phikeia has special meaning to those who have signed *The Bond of Phi Delta Theta*. This name obligates you to strive to pursue the ideals of Friendship, Sound Learning, and Rectitude. Men who share the name of Phikeia will be challenged and will learn that he finds himself fit to lead only when he is guided by principles that are true, timeless, and subservient to the good of society. The home life of the chapter should be attractive enough to hold your interest. It should be clean and well organized to hold your respect, and it should offer an outlet for unselfish service that it may stir the best emotions and develop latent manhood. Chapter life cannot measure up to these standards unless every Phikeia has responded to the sure tests of character, leadership, and scholarship during the Phikeia period. I now welcome you to the chapter as Phikeias."

The chorister leads the chapter in a song, followed by individual congratulations to each new Phikeia.

AFTER THE CEREMONY

After the conclusion of the ceremony, be sure to collect full names, email addresses, and phone numbers of all Phikeias for the appropriate officer to enter into myPhiDelt. Also, make sure all Phikeias have submitted their induction fees to the chapter treasurer.

ASSIGN THE MANUAL OF PHI DELTA THETA INTRODUCTION SECTION

IDEAS FOR INDUCTION NIGHT

Induction night can be an exciting time for the Phikeias and the chapter. The safety of respect of the Phikeias, the chapter, and Phi Delta Theta should be considered to be the most important aspect of planning an Induction night. Thus, all policies and procedures for Risk Management and event registration for both Phi Delta Theta and your campus should be strictly followed.

SHARED MEAL

It is common for a chapter to plan a large meal for the entire chapter, immediately following the ceremony. Whether at the chapter facility, in a room on campus, or at an area restaurant, a fellowship meal can easily illustrate the bonds of Friendship and family environment that we all enjoy as Phi Delta Theta men.

KEYNOTE SPEAKER

Prominent alumni, campus administrators, community leaders, and even chapter members can make excellent keynote speakers. Their stories and experiences can offer wisdom to the new Phikeia class. Having a keynote speaker after the ceremony or during a meal is a great way to set the tone for the Phikeia Program, and show the new members that they made the right decision in joining Phi Delta Theta.

CAMPUS REVEALING

Since the Induction Ceremony is an open ceremony in Phi Delta Theta, you can really roll out the red carpet for your new Phikeias by inviting campus administrators, other organizations, student government, parents and family, alumni, and other guests to watch the men become Phikeias.

To further welcome the men into Phi Delta Theta, a reception after the ceremony with snacks and mix and mingle time is a terrific way to welcome the men and introduce the Phikeias to the key stakeholders and partners on your campus.

PHIKEIA RETREAT

EXAMPLE

PURPOSE:

The Phikeia Retreat is the launching point for the Phikeia program's meetings and events. It is at this retreat that Phikeia come together as a class to get to know each other as well as brothers in the chapter better than they did during recruitment. The ideal retreat is a mix of business and fun that includes the induction ceremony, an introduction meeting, and an event. Overall, the retreat should make all attendees feel better about their membership within Phi Delta Theta.

NEEDED:

- People:
 - President
 - Phikeia educator
 - Adviser(s)
 - Education committee
 - Treasurer
 - Chaplain
 - Phikeia
 - Potential Big Brothers
- Location:
 - The retreat should be somewhere on campus, in town, or within a manageable driving distance that is not the chapter house. The retreat should minimize daily interruptions and allow attendees to focus on bonding and learning about the membership expectations.
- Materials:
 - Laptops
 - Membership expectations list
 - Phikeia pins
 - *The Manual of Phi Delta Theta*
 - Printed Phikeia packets

-
- Loose-leaf paper and post-it notes
 - Induction ceremony materials: script, candles, roll book, etc.
 - Projector and presentation (if desired)

INDUCTION **30 MINUTES**

- Follow the induction materials provided

INTRODUCTIONS **10 MINUTES**

- Chapter president
 - Welcome the new members and congratulate them on being selected by the chapter as men on campus who exemplify the cardinal principles of Friendship, Sound Learning, and Rectitude. Explain what your role is, and how you are important to the chapter as well as the Phikeia program. Finally conclude by assuring them that you are a resource for them.
- Adviser
 - Welcome the new members and active members. Introduce yourself and how you volunteer your time to help the chapter. Explain how a fraternity is a lifelong commitment rather than four years. Extend your support by offering your contact information if they are in need of anything you can help with over the process or while they are in school.

PHIKEIA EDUCATOR

- Have the new members quickly introduce themselves to everyone in the room.
- Introduce yourself and your role as the Phikeia educator as well as your committee.
- Explain the purpose of the retreat, and a brief overview of the schedule.

PROGRAM OVERVIEW **15 MINUTES**

- Phikeia Educator and committee
 - Brief overview of the program
 - Week-by-week breakdown
 - Point out where they can find important contact information
 - Explain the use of myPhiDelt and PDT U
 - Review health and safety and risk management policies and how they pertain to Phikeia, brothers, and the chapter. (e.g. Anti-hazing Policy, Alcohol-Free Housing, Good Samaritan Policy, Bystander Education, and event planning procedures)
 - Actions of brothers and Phikeias reflect on the chapter as a whole
 - "Joining Phi Delta Theta, you are now a representative of the chapter, the community, the alumni, the international organization, and future members. This comes with many responsibilities, but mostly, it comes with a responsibility to do what ought to be done. This comes from a quote from our Founder Robert Morrison: 'To do what ought to be done but would not have been done, unless I did it, I thought to be my duty.' Overall, as Phis we should look out for those around us and always act with dignity."
 - If initiated, new members will continue their education to further develop as brothers with the chapter, their big brothers, and as a class.

EXPECTATIONS **25 MINUTES**

- Phikeia educator and committee
 - Tell the Phikeia why you joined the chapter, provide an example that goes beyond having friends in the chapter.
 - Ask the Phikeia to write down two items on a piece of paper:
 - Why are you joining Phi Delta Theta?
 - What do you hope to get out of joining Phi Delta Theta?
 - It is important to stress to go deeper than "I liked the brothers."
 - Give them time to write something down and ask for a few to share.
 - **Collect the papers to be used at the end of the Phikeia process.**
 - Explain that joining the chapter is a give and take. The more they put into their experience, the more they will get out of it. For this reason, **every Phikeia will shadow an officer or be a part of a committee** before they are initiated to see what part of the chapter they can have a role in shaping for the future.

MYPHIDELT AND PDT U

15 MINUTES

- Phikeia educator and committee
 - Register all Phikeia on myPhiDelt, they will get a confirmation email and will need to create an account before the first meeting
 - Show the Phikeia how to login to myPhiDelt and access PDT U. Assign them the first module to complete before the first meeting of the program

VIDEO 5 MINUTES

- To wrap up, we are going to watch a quick video: <https://www.youtube.com/watch?v=eOZfGZOrENA>
 - "Meeting your true potential by celebrating yourself and each other." Looking at your college career, or further, what does your greatest potential look like?
 - Allow for responses, and end by sharing how you have personally benefited from joining the chapter or taking a leadership position.

DEBRIEF 10-20 MINUTES

- A lot of information was given to the Phikeias today, so take the time to ask them what they learned and if they have any questions.
- Explain that each week of the program is meant to showcase one of the Cardinal Principles. Each step further into the program will allow the Phikeia to learn more about the chapter and themselves. Clearly state that **you get out what you put into the Fraternity**. This is an ever-growing chapter, and within the next four years the Phikeia will become the leaders.

EVENT 60-90 MINUTES

- Escape Room Challenge
 - Debrief questions:
 - What did you learn about each other in the escape room?
 - What made the team successful/What hindered your success?
 - What would you do differently if you could do it again?
 - What role did you play in the group?
 - Who stood out as a leader? Why? What traits did they have?
 - Explain the different leadership styles of:
 - Modeling the way
 - Inspiring a shared vision
 - Challenging the process
 - Enabling others to act
 - Encouraging the heart

REMINDERS 5 MINUTES (OR POSTED IN AN EMAIL OR ONLINE NOTIFICATION)

- Remind them of anything that needs done for the next meeting/activity as well as the schedule
 - Friendship module on PDT U
 - Look over *Manual of Phi Delta Theta*
 - Review the *Phikeia Oath* (page 4)
 - Pay dues on _____ or set up payment plan with treasurer

FACILITATION GUIDE

ONBOARDING

THINGS NEEDED TO BE ARRANGED/PLANNED PRIOR TO MEETING:

- Reserve any spaces on campus and communicate to the chapter, advisers, and speakers all dates and times for Phikeia meetings
- Instructions for Phikeias to create their myPhiDelt account: http://phideltatheta.org/resources/myPhiDelt_guide.pdf
- Risk Management and Alcohol-Free Housing affidavits for Phikeias to review and sign

MATERIALS NEEDED FOR PHIKEIA EDUCATOR:

- Flip chart paper or dry erase board
- Additional materials (if necessary) for selected brotherhood Initiatives and/or selected Additional Suggested Activities

MATERIALS FOR PHIKEIA TO BRING WITH THEM TO THE MEETING:

- *Manual of Phi Delta Theta*
- Laptop or smart phone

FOR REFERENCE:

The Manual of Phi Delta Theta, Introduction section

SUGGESTED MEETING OVERVIEW:

| TIME ALLOTTED | ACTIVITY |
|---------------|---|
| 10–15 minutes | Introductions and Teambuilder |
| 15 minutes | Overview of the Phikeia Program |
| 10 minutes | The Three Cardinal Principles |
| 15 minutes | Member Expectations |
| 5 minutes | Phikeia Business: Assignments/Reminders Before Next Phikeia Meeting |

APPROXIMATE TOTAL TIME: 60 MINUTES

1. INTRODUCTIONS AND TEAMBUILDER 15 MINUTES

For anyone that did not attend the Phikeia Retreat OR if the retreat is held after the first meeting, do the following:

Instructions:

- Have the Phikeias arranged in a circle, and each person has an opportunity to share their background (i.e. where they come from, how they got to where they are, significant life events that have influenced who they are today).
- Each person should have around three to five minutes to speak, however, do not discourage people from sharing their personal experiences by cutting them off simply because they wish to go longer.

Techniques for Facilitation:

- Have the Phikeia educator or a member of the Phikeia Education Committee go first role-modeling for the Phikeias.
- Read the group and know when to take a short intermission if necessary.

2. OVERVIEW OF THE PHIKEIA PROGRAM 15 MINUTES

Share (Consider PowerPoint or something visually appealing)

- Start by reading the Phikeia Oath.
- The Phikeia program is at the beginning of the lifelong journey as a member of Phi Delta Theta. It is the 'Alpha' to the 'Omega' for our organization.
- It is where we begin to instill the idea of 'brotherhood' into our members. It is a mix of a sense of belonging, an understanding of the shared standards and expectations to be a part of a special group, and most importantly, a family—the closest equivalent to a home away from home.
- As a Phikeia, a man will learn about the history, life, principles, and other important pieces of the Fraternity that thousands of men before him have learned and cherished.

- This is the time where a man begins to live the ideals of Phi Delta Theta daily. These same ideals further contribute to the ability of our members to exemplify our Three Cardinal Principles.
- The overall program is made up of various parts. At its core is the educational component. From the history, values, operations, and chapter brotherhood, there is much for each Phikeia to learn about our organization. Each Phikeia's experience is unique to the individual.
- These educational opportunities come in many forms to our chapters, whether it be directly from the Phikeia manual, the PDT U modules, alumni/guest speakers, or other activities. At its most basic form, the chapter Phikeia program must provide constructive Phikeia education and mentorship to each participant.
- With that, one important piece that is learned are the expectations of membership. It is these obligations of the Fraternity that remind us of the oaths that we take to the organization. More importantly for you all, it is the Phikeia Oath.
- The Phikeia program also teaches new members the organizational and operational side of things, from Phikeia class officers all the way to the structure of the Phikeia meetings. This is to help ease the transition into full membership so that, upon gaining the ability to vote, the recently initiated member will have learned the ropes prior.
- Mentorship comes in various forms, but most importantly in the form of a Big Brother. The Big Brother program is supposed to provide each Phikeia with a chapter mentor that helps the Phikeia to adjust to college life, to acquaint himself with the chapter, and to complete the Phikeia program. Throughout this experience, we recommend that each of you intentionally connect with your Big Brother to discuss what you are learning throughout this program and to check-in.

Facilitation Activity:

- Provide the Phikeia class five minutes to define mentorship and describe the ideal qualities of a Big Brother.
- Review their responses and provide specific examples of how the Big Brother program can serve as a mentorship experience.
- Have the additional members of the Phikeia class contribute to the brainstorm of the lists as well.
- Encourage the Phikeias to keep these qualities in mind as they meet brothers and select their Big Brother.

3. THE THREE CARDINAL PRINCIPLES 10 MINUTES

Share (Consider PowerPoint or something visually appealing)

- The philosophical core of the Phikeia Program lies within the Three Cardinal Principles, developed by Walter B. Palmer and George Banta Sr., who are commonly referred to as the Second Founders.
- Palmer wrote that "Phi Delta Theta was organized with three principle objectives: the cultivation of Friendship among its members; the acquirement individually of a high degree of mental culture, and the attainment personally of a high standard of morality."
- If we boil that down, we can easily pick out the three Cardinal Principles that we refer to today: Friendship, Sound Learning, and Rectitude.
- The first principle, Friendship, is derived from the relationships of the Ancient Greeks and Romans. It helps to emphasize the give-and-take that can take place in this symbiotic understanding between a member and the organization.
- Friendship was more than simple camaraderie. It was this ideal that served as a basis for the formation of Phi Delta Theta by its founders.
- Sound Learning, the second of the three Cardinal Principles, does not immediately imply collegial scholarship. Rather, it emphasizes an intellectual curiosity and a search for knowledge of the unknown.
- Our third Cardinal Principle, Rectitude, greatly helps to represent our commitment to Phi Delta Theta and the expectations of character that we all exemplify in our daily living. It is defined as the idea of moral integrity or correctness of judgment.
- Throughout each member's experience in our organization, there will come a time where he is challenged to decide between what is right and what is wrong, even if what is wrong seems enticing and would be easier to do. In all this, every man will be challenged to reach a conclusion as to what is truly a 'good' for all—behaviors which will rest upon that which is both true and good.

Facilitation Questions:

Have each Phikeia answer the following questions and then pair up to share and report back to large group:

- Give a personal definition of friendship
- What is your idea of scholarship excellence?
- Discuss your moral principles. What is most important to you morally?

4. PHIKEIA BUSINESS

5 MINUTES

Facilitator Note:

Phikeia business is a time reserved for chapter-related business each week including information about upcoming events, etc. This is a good time to remind Phikeias that there will be officer elections during the next Phikeia meeting. It is encouraged that each Phikeia meet with executive officers they might be interested in learning more about before then.

Suggestions for additional things to be done during this week include:

- Phikeias complete registration for myPhiDelt access
- Phikeias sign Risk Management Affidavit and Membership Agreement

ASSIGNMENTS/REMINDERS BEFORE NEXT PHIKEIA MEETING:

- PDT U Phikeia Education Experience: Friendship
- Read *Manual of Phi Delta Theta*, Friendship section
- Share date and time for Phikeia Brotherhood event

ADJOURN

REMINDERS FOR NEXT MEETING FOR PHIKEIA EDUCATOR:

Review the content and activities for next week and ensure that everything is planned for. Additionally, take a look at the Additional Suggested Activities and if interested in facilitating one of those activities, make sure to prepare materials or plan for the activity accordingly.

WEEK 2: FRIENDSHIP

OVERVIEW

HOUSEKEEPING:

- Phikeia educators will need to **plan ahead** to reserve any spaces on campus and communicate to the chapter, advisers, and speakers dates and times of all meetings for the Phikeia program
- Follow up with Phikeias before meeting to complete Friendship PDT U module
- Remind Phikeias of their financial obligations
- Review the Big Brother ceremony and activities to do before and after
- Help Phikeias organize a community engagement program/project (this does not need to be executed during the third week)
- *Be sure all Event Planning Forms are completed through myPhiDelt*

EXPECTATIONS FOR EDUCATOR:

The Phikeia educator will:

- Host weekly meeting
- Invite a guest speaker about mental health, brotherhood, or masculinity
- Assist in the planning of the Phikeia/brotherhood event
- Prepare to discuss the Friendship module
- Assign Sound Learning PDT U module for week three
- Discussion topics:
 - *The Phikeia Oath*
 - Friendship vs. Brotherhood
 - Definition of Friendship, why it is a Cardinal Principle
 - Prepare Phikeias for the Big Brother Program

| EVENT INFO | RESPONSIBLE OFFICER(S) |
|---------------------------|--|
| Friendship meeting | Phikeia educator, Phikeias |
| Phikeia/brotherhood event | Phikeia educator, Phikeias, potential Big Brothers |
| Officer meeting | Phikeia, chapter leadership. Phikeias should meet with or shadow one officer or committee in the chapter during the four weeks |
| Big Brother Reveal | Phikeia educator, president, Phikeias, Big Brothers, CAB member, and chapter |

FACILITATION GUIDE

THINGS NEEDED TO BE ARRANGED/PLANNED PRIOR TO MEETING:

Review the content for the Friendship Module and ensure that everything is planned for, including having all the materials prepared. Additionally, take a look at the Brotherhood Initiatives and Additional Suggested Activities and make sure to prepare materials or plan the activities of your choice accordingly.

MATERIALS NEEDED FOR PHIKEIA EDUCATOR:

- Flip chart paper or dry erase board
- Additional materials (if necessary) for selected brotherhood initiatives and/or selected additional suggested activities

MATERIALS FOR PHIKEIA TO BRING WITH THEM TO THE MEETING:

- *Manual of Phi Delta Theta*
- Laptop or smart phone
- Digital or printed copy of responses from Friendship Module

FOR REFERENCE:

The Manual of Phi Delta Theta, Friendship Section

SUGGESTED MEETING OVERVIEW:

| TIME ALLOTTED | ACTIVITY |
|---------------|---|
| 10 minutes | Phikeia Oath and Brotherhood Initiatives (Team builders, Energizers, Initiatives) |
| 15 minutes | Friendship and Brotherhood |
| 15 minutes | Mentorship and Values Congruence |
| 15 minutes | History of Phi Delta Theta |
| 15 minutes | Phikeia Business: Assignments/Reminders |

APPROXIMATE TOTAL TIME: 60-90 MINUTES

1. PHIKEIA OATH AND BROTHERHOOD INITIATIVES 10 MINUTES

(Team builders, energizers, leadership development exercises)

Facilitator Note:

Each Phikeia meeting should begin with the Phikeias reading the *Phikeia Oath* followed by the Phikeia educator or members of the Phikeia class facilitating brotherhood initiatives (including team builders, energizers, and or other leadership development initiatives). The purpose of these exercises is to assist the process of the Phikeias getting to know each other during the Phikeia education program, as well as for the Phikeias to develop trust and brotherhood within the group.

2. FRIENDSHIP AND BROTHERHOOD 15 MINUTES

Facilitator Note:

The following provides an opportunity for Phikeias to discuss the characteristics of Friendship as well as brotherhood and distinguish between the two.

Before Facilitation Processing:

(Prior to facilitating the following, feel free to ask some of the following questions):

- In the online module, members of Phi Delta Theta talked about what Friendship means to them, what stood out to you about some of the things they said?
- Why do we spend time talking about Friendship as you think about membership in a college fraternity?
- What role has Friendship played in your life up until this point?
- What role has Friendship played for you in college so far?
- What role has Friendship played in your Phikeia experience thus far?

Instructions:

- Using chart paper, write the word “Friendship” on one piece of paper and “brotherhood” on another.
- First, have the Phikeias brainstorm what the characteristics of Friendship are. Write what they come up with on the piece of chart paper (bulleted list).
- Secondly, have the Phikeias brainstorm what they believe to be the characteristics of brotherhood are.
- Once both lists have been created, bring the discussion to the large group asking some of the after-facilitation processing questions below.
- After asking the questions below, have a few members of the Phikeia class share testimonials related to what Friendship and brotherhood mean to them as members of Phi Delta Theta giving specific examples from their own experiences of when they have experienced true Friendship and brotherhood in the Fraternity.



Techniques for Facilitation:

- As you are having the Phikeias list off the characteristics of both Friendship and brotherhood, ensure that as many Phikeias as possible are participating and helping to brainstorm the list.
- Have one member of the Phikeia Education Committee facilitating the conversation while another one writes on the chart paper.

After Facilitation Processing:

Have each Phikeia answer the following questions and then pair up to share and report back to large group:

- Was it easy to come up with the lists? Was one easier than the other?
- What similarities do you see between both lists?
- What differences do you notice as you look at both lists? (*Note: It is important that through this discussion that you eventually get to the point that general friends don't necessarily hold each other accountable in the same way brothers do. Brothers hold brothers accountable and help you learn from mistakes so that you don't repeat those mistakes later in life.*)
- In reading the *Manual of Phi Delta Theta* and doing the online module for Friendship, do you think there is a difference between Friendship and brotherhood?
- In thinking about examples that you have either observed amongst active members of the Fraternity or have experienced yourselves as Phikeia, how is Friendship and brotherhood experienced as members of Phi Delta Theta?
- Review the three answers from the PDT U Module that the Phikeias downloaded at the end of the activity.

3. MENTORSHIP AND VALUES CONGRUENCE

15 MINUTES

Facilitator Note:

Defining and understanding how we take our value of Friendship and live it out within our brotherhood is a key part of the Phikeia experience. It helps to serve as the basis of connection from person to person within Phi Delta Theta.

Share (Consider PowerPoint or something visually appealing)

- As we look at the words that came to mind when we think “brotherhood”, we can easily pick out some key words that align with our values as individuals. For instance, [pick a word from their list] resonates with me in that [give an example].
- This is important to remember as it is our personal values that drove us to join such an organization as Phi Delta Theta. These values have served as personal guiding lights for us and will continue to develop and become further refined.
- The differences in our personal values is what helps to uniquely shape our chapters and adds variance to our membership
- Our mutual pledge to accept and uphold, first the *Phikeia Oath* along with our organization's values, together as brothers is what brings us together
- It creates a common set of values that we accept, defend, and live out daily. This mutual agreement of upholding these values is the basis of our membership in Phi Delta Theta. Hence, One Man is No Man.
- Understanding our values and how we share values with one another is important to keep in mind while operating as a chapter. More importantly, it helps us identify potential members in the future. When you meet a guy on campus that you think exemplifies that values that you see in your fellow brothers, ask yourself, “Why is he not a Phi Delt?”
- It is these similarities that helps us to bring more members that believe and act out the values of our organization.

-
- You also want to be able to exude that air of Friendship while you are on the reverse side, recruiting potential new members. We can live out our value of Friendship by knowing no stranger and being a friend to everybody. It is this type of magnetism that draws folks in and makes them want to be associated with you.

Facilitation Activity:

- When thinking of your values and also those that we discussed when talking about the meaning of brotherhood, I want to challenge you: Think of someone in the chapter that you see demonstrating these values.
- When thinking of this Phi, think of how you met them, what qualities made you look up to them, and ways that you have seen them exemplify Friendship.

After Facilitation Processing:

Have each Phikeia answer the following questions and then pair up to share and report back to large group:

- Tell us who you thought of and why they came to mind.
 - In what ways can you learn to live out this value to its fullest?
 - How do you plan on furthering the value of Friendship with your chapter now? In the fall/spring?

4. HISTORY OF PHI DELTA THETA 15 MINUTES

Share (Consider PowerPoint or something visually appealing)

- Alpha Delta Phi, which was founded at Hamilton College in 1831, started its chapter at Miami University in 1833 becoming the first fraternity west of the Allegheny Mountains. Beta Theta Pi was founded shortly thereafter at Miami in 1839.
- We can jump forward in time to the year familiar to us all, 1848. At that time, the students at Miami University were protesting against the campus administration, and they did so by barricading the entrance to the main administrative building with snow and debris, when it was removed, they returned the next day and did it again. In retaliation, the administrators expelled a big group of the students there, including almost all of the Greeks who were currently on campus.
- Robert Morrison noted the absence of Greeks on Miami University's campus, and still firmly believed in the value of fraternity. This inspired him to speak to his classmate, John McMillan Wilson, about starting a Greek letter society of their own. They went on to bring in other friends who they thought would provide value to the group, Robert Thompson Drake, John Wolfe Lindley, Ardivan Walker Rodgers and Andrew Watts Rodgers, and on December 26th, 1848, they founded Phi Delta Theta in Old North Hall, now known as Elliott Hall.
- Within the following week in the form of what we refer to as the four historic meetings, the Immortal Six would go on to create a motto, *The Bond of Phi Delta Theta*, and initiate their first member, Morton George Williams.
- Especially notable about the about the founding of Phi Delta Theta is the context in which it was done. Phi Delta Theta was founded out of Morrison's recognition of the importance of Greek letter organizations. Instead of protesting like similar students and negatively impacting their campus, he instead gathered those closest to him and sought to create a fraternity that upheld the high standards of morality he thought was required of such organizations.

Facilitation Question:

(After you have completed presentation above, feel free to ask some of the following questions):

- What stood out to you about what you just learned about History of Phi Delta Theta?
- What impact do you think the context in which Phi Delta Theta was founded has on what it means to be a Phi Delt today?

5. PHIKEIA BUSINESS 15 MINUTES

Facilitator Note:

Phikeia business is a time reserved for chapter-related business each week including information about upcoming events, etc.

Suggestions for additional things to be done during this week include:

- Check in on any event planning to-do items for Phikeia Events
- Share date and time for Brotherhood event

Big Brother Program:

- With the Big Brother Program resource, review the next steps with the Phikeias:
 - Upcoming brotherhood events
 - Deadline for Big Brother preference list (example: Thursday, before Big Brother reveal)
 - Date of Big Brother reveal (example: Saturday)

ASSIGNMENTS/REMINDERS BEFORE NEXT PHIKEIA MEETING:

- PDT U Phikeia Experience: Sound Learning
- Read *Manual of Phi Delta Theta* Sound Learning section
- Meet with or shadow one executive board officer between now and next week

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BIG BROTHER PROGRAM

CHOOSING MENTORS FOR THE NEW MEMBERS

The traditional part of the Phikeia Program, Big Brothers are also very useful to the Phikeia educator in establishing meaningful ties between the chapter and its newest members: the Phikeias. Big Brothers provide a closer, less intimidating relationship for the Phikeias. The Big Brother serves as a mentor, counselor, advisor and, most importantly, as a friend. He can make the difficult transition to college life easier for the Phikeia. Not only can he transmit his knowledge of the campus, he can also introduce the Phikeia to people, new campus activities, and resources.

The Big Brother-Little Brother relationship can be a very close and promising one, but Big Brothers must also realize that it is an important responsibility.

PURPOSE OF BIG BROTHERS

The purpose of the Big Brother is to help the Phikeia make the difficult transition to college life. The Big Brothers can remember what it was like when they first joined the Fraternity. With a new group of friends, a new environment, and rigorous study schedule, adjusting to college life is intimidating. The Big Brother should answer the Phikeia's questions, help him meet the demands of the Phikeia program, introduce him to the campus, and make him feel at ease.

ASSIGNMENT OF BIG BROTHERS

Selecting members as Big Brothers is a task that warrants thoughtful consideration. Having involved, responsive, and enthusiastic Big Brothers can make the job of the Phikeia educator much easier, and they can make a Phikeia's experience much more rewarding.

The following factors should be considered in selecting and assigning a Big Brother:

- 1. Members in good standing:** Do not select any brothers who are financially delinquent to the chapter nor who earned a deficient GPA in the previous term.
- 2. The member wants to participate:** Ask the member if he wants the responsibility of being a Big Brother. Show him the expectations and the benefits and ask him to make a commitment to the program for eight weeks. Big Brothers should be enthusiastic about the program, and they should also realize that their commitment lasts after the Little Brother's initiation.
- 3. Personality and Leadership:** Personality conflicts should be avoided if they can be predicted. Members with outstanding leadership ability should be encouraged to participate. A leader will often be more able to schedule the time demands of a Big Brother and will be responsible enough to be a good role model.

Once the Phikeia Education Committee has compiled a list of members

eligible to be Big Brothers, the Phikeias, at their first formal meeting, should write their name and the names of their top three preferences for a Big Brother on a piece of paper. Limit the Phikeias to a list of members previously established eligible members to be a Big Brother.

After you collect the preferences, the Phikeia Education Committee has the task of matching the Phikeia with his Big Brother. The Big Brothers may be involved in the selection process, but it is not necessary. If a Big Brother and the Phikeia have similar interests they will ordinarily work better together. Men with similar majors are good combinations, because the Big Brother can better assist the Phikeia in his studies.

BIG BROTHER ORIENTATION

After the Big Brothers are selected, the Phikeia educator should meet with them to review the Phikeia Program and discuss the expectations of a Big Brother. Schedule this meeting right after Big Brothers are selected and before the Big Brother Ceremony. You should make copies of this section as well as the schedule of the Phikeia Program for each of them. Suggest that they each get a daily planner to mark all the scheduled Phikeia events they will need to attend.

1. Hand out and review the Phikeia Program schedule (10 min.)
2. Have the Big Brothers set expectations and standards for themselves as a group (20 min.)
3. Hand out copies of this section and discuss expectations and responsibilities of Big Brothers (15 min.)
4. Hand out copies of the Phikeia requirements for initiation and discuss them (10 min.)
5. Have the Phikeia Education Committee chairman discuss the Phikeia Education Committee and disciplinary procedures (15 min.)
6. Discuss ideas for Big Brother/Little Brother activities (20 min.)
7. Review the Little Brother Report (5 min.)
8. Have the scholarship chairman review the Phikeia scholarship program (5 min.)
9. Discuss the FEA Statement of Position on Hazing (10 min.)
10. Discuss potential concerns of Phikeias (ie grades) and how the group of Big Brothers can help support the Phikeias (10 mins.)
11. Questions and wrap-up

THE BIG BROTHER CEREMONY

The announcement of Big Brothers occurs as a separate event, ideally in week two of the Phikeia Education period. It can also take place during the Phikeia retreat if the retreat occurs early in the process. Big Brothers should bring a gift of some sort for their Little Brother (i.e., sportswear with $\Phi\Delta\Theta$ letters, a Big Brother family tree, or other Fraternity-related item).

WHEN SHOULD THE BIG BROTHER CEREMONY TAKE PLACE?

The ceremony should take place soon after the recruitment process is complete. Chapters may also assign Big Brothers to accommodate recruitment timelines, etc. The chapter treasurer should also be sure to collect the Phikeias dues up front and in full before the ceremony to avoid confusion and collection problems later.

WHO IS RESPONSIBLE FOR THE BIG BROTHER CEREMONY?

The Phikeia educator and the Phikeia Education Committee should be responsible for preparing and coordinating the ceremony. Be sure to read this section thoroughly to properly prepare the chapter and the new members for the ceremony.

PREPARING FOR THE CEREMONY

The Phikeia educator must choose an appropriate location (a chapel, the chapter house, or other solemn location), then he should pick a specific date and time well in advance and notify all those involved, especially the Phikeias.

APPROPRIATE ATTIRE

Dress for all Phikeias and members is coat and tie, and all chapter members should be present.

SUPPLIES TO BRING TO THE CEREMONY:

- Six blue or white tapered candles
 - » Six of one color, or three of each are appropriate
- The Fraternity flag or coat-of-arms as a backdrop

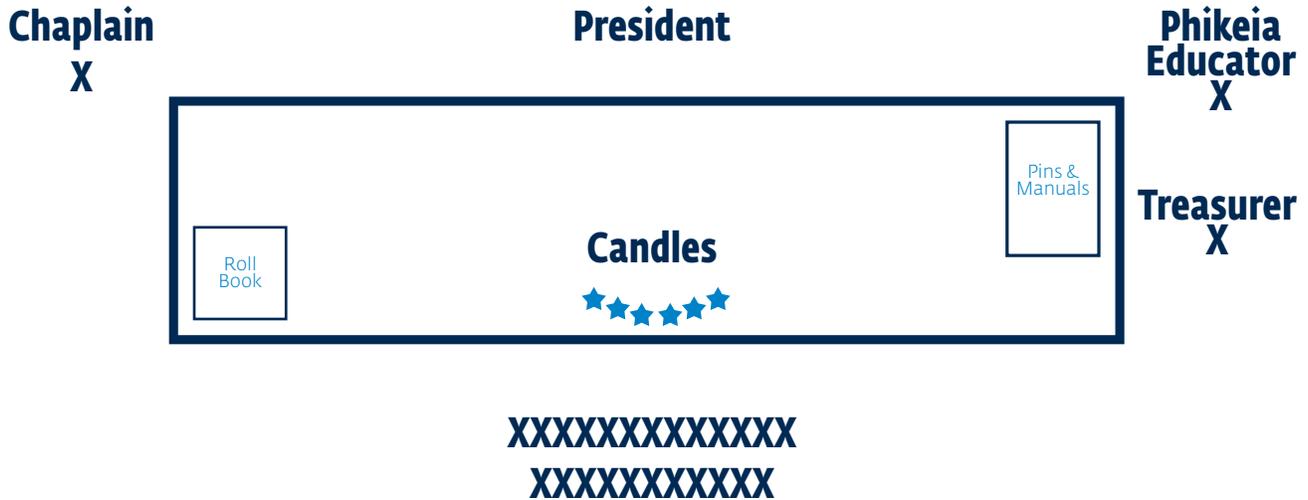
THE BIG BROTHER CEREMONY

Phikeias are assembled in an anteroom in preparation for the Big Brother Ceremony. The main room is arranged as shown in the diagram, and the candles are lit. The lights should be dimmed slightly. The members of the chapter should stand or be seated off to the side or around the Phikeias in a horseshoe.

There should be enough space behind each Phikeia's chair for the Big Brother to stand behind his Little Brother.

The warden leads the new Phikeias into the room as chapter softly sings "Eternal Praise," "Warrior Greeks of Old," or another appropriate song of the Fraternity.

Phikeias remain standing in front of their chairs as previously instructed by the warden.



PRESIDENT:

"Let us pray."

CHAPLAIN:

"Heavenly Father, direct us in our normal daily living, and may our friendships in Phi Delta Theta continue to enrich these men, and in turn, the entire chapter. Bless these men and their Big Brothers with your eternal guidance as they take the next step in membership in Phi Delta Theta. Grant us all the strength and wisdom to act in a manner to bring honor to ourselves and to the Fraternity. Amen."

PRESIDENT:

"Please be seated. For the duration of your journey as Phikeias, you will need guides and mentors to teach you the ways and principles of this, our great Fraternity. These men will be your teachers and close friends not simply until your quest for initiation is complete, but for years to come."

"Brother (*Phikeia Educator*) will now announce the Big Brother pairings."

THE BIG BROTHER CEREMONY

PHIKEIA EDUCATOR:

"Big Brothers, when I call your name, please step forward and take your place behind your Little Brother."

The Phikeia educator should read the pairings one at a time.

PRESIDENT:

"To formally induct you to the position of a Big Brother of the (*your chapter designation*) Chapter of Phi Delta Theta, you will please stand and repeat the Big Brother Creed after me.

"I (state their names) understand that as a Big Brother ... it is my personal responsibility to act ... as a mentor, ... advisor, ... and friend ... to my Little Brother, ... and that I will share with him ... my knowledge of Phi Delta Theta.

I promise to help my Little Brother ... become the greatest version of himself, ... worthy of being initiated into our great Fraternity ... I will pass on to him ... the principles of friendship, ... sound learning, ... and rectitude, ... and I will instill in him ... a sense of personal responsibility, ... not only through the wisdom of my words, ... but through the integrity of my actions ... I am my brother's keeper."

Slight pause

PRESIDENT:

"Brothers, you have heard these men recite the Big Brother Creed, committing their knowledge and guidance to the success Phikeias. What say you?"

CHAPTER MEMBERS RESPOND:

"We are witnesses."

PRESIDENT:

"Phikeias of the (*your Chapter designation*) Chapter of Phi Delta Theta, throughout your journey, your Big Brothers will not only aid and assist you in fraternal and scholarly matters, but they will also celebrate the joys and bonds of brotherhood with you. Let their guidance and experience be a resource as you continue on the path to full membership in Phi Delta Theta.

The chorister leads the chapter in a song, followed by individual congratulations to each new Phikeia and Big Brother. Big Brothers may now present the Phikeias with their gifts.

Once the ceremony has concluded you may choose the end the evening with a 'Pass the Gavel' or 'Proud to Be.'

After the ceremony, the group should go to a prescheduled activity like a varsity sports event or a social event just for the Big Brothers and Little Brothers.

THE BIG BROTHER CEREMONY

REMOVING BIG BROTHERS

Do not be averse to reassigning or switching Big Brothers. Be mindful that the Phikeias are our most important asset. The Phikeias are the future of our organization and they deserve attention, time, and effort. If a Big Brother is not meeting the required expectations, you should have him meet with the Phikeia Education Committee to discuss his performance.

If the committee agrees that the member is not performing up to expectations, he should be removed. The Phikeia should be asked for his input regarding a replacement.

BEING A BIG BROTHER

Being a Big Brother is an exciting part of fraternity life, but it is also an important responsibility. The Big Brother serves as a mentor, counselor, advisor, and friend to the Phikeia. It is not a relationship for the freshman year alone. It is a special friendship that lasts throughout the undergraduate years and beyond.

BIG BROTHERS HAVE THE FOLLOWING RESPONSIBILITIES:

1. Attend an orientation meeting with the Phikeia educator
2. Attend the Big Brother ceremony
3. Attend all scheduled Big Brother activities
4. Meet with the Phikeia's professors once during the Phikeia period (if this is possible)
5. Attend Phikeia Education Committee with your Little Brother
6. Ensure the Phikeia is fulfilling his financial obligations
7. Monitor the Phikeia's progress in his studies and encourage him
8. Spend time one-on-one with your Little Brother at least once a week
9. Ensure that the Phikeia is meeting the requirements of The Phikeia Program so that he may be initiated.

RESOURCES

BIG BROTHERS SHOULD READ:

- *The Manual of Phi Delta Theta*
- Chapter's bylaws
- *The Code of Phi Delta Theta*
- Risk Management Policies
- The chapter history

These are documents that both the Phikeias and the Big Brothers should be familiar with. In addition, Big Brothers should be knowledgeable of the campus, especially where campus security, the health center, and administrative buildings are located. They should know emergency numbers for the health center or crisis center, first aid, campus police, campus Greek official and the dean of students.

WEEK 3: SOUND LEARNING

OVERVIEW

HOUSEKEEPING:

Phikeia educators will need to **plan ahead** to reserve any spaces on campus and communicate to the chapter, advisers, and speakers dates and times of all meetings for the Phikeia program.

- Follow up with Phikeia before meeting to complete Sound Learning PDT U module
- Remind Phikeia of their financial obligations
- Solidify service project details and location
- Prepare for guest speaker or alumni event in week three

EXPECTATIONS:

The Phikeia educator will:

- Host weekly meeting
- Invite an officer or guest speaker to talk about service and philanthropy
- Assist in the planning of the service or philanthropy event
- Prepare to discuss the Sound Learning module
- Assign Rectitude PDT U module
- Discussion topics:
 - *The Phikeia Oath*
 - Definition of Sound Learning, why it is a Cardinal Principle
 - Sound Learning in and out of the classroom

| EVENT INFO | RESPONSIBLE OFFICER(S) |
|------------------------|---|
| Sound Learning Meeting | Phikeia educator, Phikeias, scholarship chairman, service and/or philanthropy chairman/chairmen |
| Service event | Phikeia educator, Phikeias, Big Brothers |
| Officer meeting | Phikeias, chapter leadership. Phikeias should meet with or shadow one officer or committee in the chapter during the four weeks |

FACILITATION GUIDE

THINGS NEEDED TO BE ARRANGED/PLANNED PRIOR TO MEETING:

Review the content for the Sound Learning Module and ensure that everything is planned, including having all the materials prepared. Additionally, take a look at the brotherhood initiatives and additional suggested activities and make sure to prepare materials or plan the activities of your choice accordingly.

Invite the scholarship chairman or members of the Scholarship Committee to come speak to the Phikeias about Sound Learning. Additionally, you will need to invite the philanthropy chairman and/or the community service chairman to speak to the Phikeias about their respective roles and the purpose of philanthropy/service in the chapter.

Organize and map out a tour of important academic resources on campus to be able to take the Phikeias to (or show where they are) during meeting.

MATERIALS NEEDED FOR PHIKEIA EDUCATOR:

Additional materials (if necessary) for selected brotherhood initiatives (see below) and/or selected additional suggested activities.

MATERIALS FOR PHIKEIA TO BRING WITH THEM TO THE MEETING:

- *Manual of Phi Delta Theta*
- Digital or printed copy of responses from Sound Learning Module

FOR REFERENCE:

The Manual of Phi Delta Theta: Sound Learning section

SUGGESTED MEETING OVERVIEW:

| TIME ALLOTTED | ACTIVITY |
|---|---|
| 10 minutes | Phikeia Oath and Brotherhood Builder |
| 10 minutes | What is Sound Learning? |
| 10 minutes | Guest Speaker: Scholarship Chairman/Member of Scholarship Committee |
| 10 minutes | Chapter Structure |
| 10 minutes | Educational and Leadership Opportunities |
| Time Varies | Campus Sound Learning Resources Tour |
| APPROXIMATE TOTAL TIME: 90 MINUTES | (INCLUDING CAMPUS SOUND LEARNING RESOURCES TOUR TIME) |

1. PHIKEIA OATH AND BROTHERHOOD INITIATIVES (BROTHER BUILDERS, ENERGIZERS, LEADERSHIP DEVELOPMENT EXERCISES) 10 MINUTES

Facilitator Note:

Each Phikeia meeting should begin with the Phikeias reading the *Phikeia Oath* followed by the Phikeia educator or members of the Phikeia Education Committee facilitating brotherhood initiatives (including team builders, energizers, and or other leadership development initiatives). The purpose of these exercises is to assist the process of the Phikeias getting to know each other during the Phikeia education program, as well as for the Phikeias to develop trust and brotherhood within the group.

2. WHAT IS SOUND LEARNING? 10 MINUTES

Facilitator Note:

The following discussion provides Phikeias with the opportunity to process the content related to Sound Learning. Begin the discussion by asking the following questions.

Processing/Discussion Questions (select from the following):

- What is Sound Learning? How is it defined?
- Why do you believe Sound Learning is the second cardinal principle? What is significant about this concept?
- According to the online module, why is Sound Learning vital to the fraternity's success?
- In what ways can you integrate Sound Learning into your everyday life? Why do you think this is important?
- According to the online module and the *Manual of Phi Delta Theta*, what are some of the ways to improve your ability to be successful in college?
- Thus far in your college experiences, what are some of the successes you have experienced academically?
- Thus far in your college experience, what are some of the challenges you have experienced academically?
- According to the manual, what are some ways that you can avoid scholarship/academic problems?
- What are some of the resources on campus you have heard of or used that assist you with maintaining a commitment to Sound Learning and your academics?
- What are some of the ways in which you can help your brothers and hold each other accountable for a commitment to Sound Learning?
- What are the ways in which you have already observed a commitment to Sound Learning demonstrated by the active chapter?
- Review the following in the Appendix (and then follow up with the following questions): Active Learning Techniques and Top 10 Science of Learning
- What stands out to you about this information? Do you believe it? Why or why not? How does it relate to how you actually learn information in your courses?
- How do these concepts relate to Sound Learning?
- Why is it important to be aware of our individual talents, preferences, and abilities as it relates to understanding Sound Learning?
- In what areas do you believe we can improve to ensure that we are committing to this Cardinal Principle?

3. GUEST SPEAKER: SCHOLARSHIP CHAIRMAN/COMMITTEE MEMBERS

10 MINUTES

Facilitator Note:

The topic of Sound Learning provides a great opportunity for the Phikeias to hear from directly from the scholarship chairman or a member of the Scholarship Committee discussing the following:

Instructions:

- Have the chapter scholarship chairman or members of the Scholarship Committee come speak to the chapter on the following topics:
 - Overview of chapter scholarship program; including study hours, incentives for succeeding academically, academic skills workshops put on by the chapter, support from chapter advisory board and/or faculty advisor, etc.
 - Expectations of members related to scholarship and academic performance.
- After he is done speaking, allow Phikeias to ask any questions they may have about the scholarship program or how Phi Delta Theta supports them academically.

4. CHAPTER STRUCTURE

10 MINUTES

Facilitator Note:

Understanding how the Fraternity ticks is just as important as learning about what we are founded on. It is essential to share the nuts and bolts of how the chapter operates with the Phikeias early. This will help pique their interest in future leadership while assisting them to understand the expectation level within each portion of chapter leadership.

Fraternity Structure:

Executive Board: At the top of the leadership is the executive board. This group consists of elected officers who hold critical positions in the chapter. They are responsible for making strategic decisions, overseeing chapter operations, and guiding the overall direction of our Fraternity. Some posts on the executive board include president, vice president, treasurer, secretary, Phikeia educator, warden, and recruitment chair.

Committee Chairs: After the executive board, various committees focus on specific aspects of our Fraternity's activities. Each committee is led by a chairman responsible for organizing and managing events, initiatives, and projects related to their position. These committees cover community service, social events, academic support, philanthropy, and more.

General Members: The heart of our chapter lies in our general members, which includes all your recruits. General members actively participate in chapter events, meetings, and activities, contributing to the success of our chapter.

Advisor(s): Our chapter may also have one or more advisors, usually alumni of Phi Delta Theta or someone interested in supporting our chapters. Advisors provide guidance and support and ensure our activities align with our Fraternity's and the university's values.

Chapter Meetings: Regular chapter meetings provide a platform for all members to discuss important matters, share updates, and decide about upcoming events and initiatives. These meetings are essential for maintaining open communication within the chapter.

As you navigate through your Phikeia program, you'll have the chance to engage with different leadership roles, contribute to our chapter's growth, and forge meaningful connections with your fellow members. Embrace the opportunities to learn, lead, and make a positive impact within our Fraternity and the community around us.

5. EDUCATION AND LEADERSHIP OPPORTUNITIES

10 MINUTES

It is essential that Phikeias understand that learning does not stop at initiation. They are beginning their Phi Delta Theta experience and have many opportunities ahead of them. Explain the following ways the Phikeias can get involved upon initiation.

Within Our Chapter:

- **Executive Board Positions:** As you gain experience and become more familiar with our chapter's operations, you can run for various Executive Board positions. These roles include president, vice president, treasurer, secretary, and even Phikeia educator. Serving on the executive board allows you to guide the chapter's direction and hone your leadership skills.
- **Committee Leadership:** Each committee within our chapter requires dedicated leaders to oversee its activities. As you become more involved, you can step into roles such as Committee Chair, helping to organize and lead events, projects, and initiatives.
- **Campus Leadership:** Taking what you learn within Phi Delta Theta and using it for good outside of the chapter is part of the oath we take as members. You are bettering yourself and your chapter by taking up leadership positions in campus organizations, the Interfraternity Council, and student employment.

From the International Fraternity:

- **Kleberg Emerging Leaders Institute:** This is an exciting undergraduate leadership program offered by our Fraternity. It takes place each July in Oxford, Ohio. It's designed to identify and develop emerging leaders within our chapters. The program includes workshops, seminars, and interactive sessions to enhance your leadership abilities and personal growth.
- **Pursuit of Greatness:** Pursuit of Greatness is a virtual, module-based leadership course the international Fraternity provides. This program offers a flexible way to enhance your leadership skills at your own pace. It covers various leadership topics, from communication and teamwork to decision-making and problem-solving.
- **Virtual Workshops:** The General Headquarters staff often hosts virtual workshops on various leadership and personal development topics. These workshops provide valuable insights, tools, and strategies to help you become a more effective leader within our chapter and other areas of your life.

These leadership opportunities are designed to help you grow, learn, and develop skills that will benefit our Fraternity and prepare you for future endeavors. Embrace these chances to expand your horizons, build lasting relationships, and make a positive impact within our fraternity community. Remember, leadership is a journey of continuous growth, and every step you take contributes to your personal and collective success.

PHIKEIA BUSINESS

Facilitator Note:

Phikeia business is a time reserved for chapter-related business each week including information about upcoming events, etc.

Suggestions for additional things to be done during this week include:

- Discuss areas of academic concerns
- Reminders of upcoming events

ASSIGNMENTS/REMINDERS BEFORE NEXT PHIKEIA MEETING:

- PDT U Phikeia Education Experience: Rectitude
- Read *Manual of Phi Delta Theta* Rectitude section
- Any other additional reminders for the week

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6. CAMPUS SOUND LEARNING RESOURCES TOUR

TIME VARIES

Facilitator Note:

The following provides the Phikeia Education Committee with the opportunity to tour the Phikeias around the academic resources on campus to help them understand what resources are available to help support them commit to Sound Learning.

Instructions:

- Identify the most important academic resources on-campus; identify their locations and take the Phikeias around campus to show them where these academic resources are located while sharing some information about how each resource can be used. Suggestions for resources to show include the following:
 - University library
 - Writing center
 - Academic support center/learning programs (workshops, tutoring, academic coaching on campus)
 - Student support services
 - Career services/center
 - Student affairs office
 - Resources for disabled students/accessibility services
- If you are unable to identify where the most significant academic resources are located on campus, contact your university staff member for assistance on your campus

Techniques for Facilitation:

As you complete the tour around campus, show the resources and share information about them, if members of the Phikeia Education Committee have used those resources and have personal experiences with them and how they've assisted them academically, this could provide a great opportunity for them to share.

Facilitator Note:

The following suggested activities provide additional options for the Phikeia educator or Phikeia Education Committee activities to do during the meeting, at another point during the week with the Phikeias, or to assign at some point during the Phikeia education period.

Suggested Guest Speakers**Time Varies**

The topic of Sound Learning provides a great opportunity for the Phikeia to hear from various guest speakers that relate to the topic discussed during the week. Suggested guest speakers this week include the following:

- **Faculty members:** Speaking about ways in which to be successful in the college classroom, strategies for engaging in the classroom and communicating with faculty members.
- **Academic advisor:** Speaking about creating an academic plan or creating an academic course of study, strategies for engaging in the academic experience at your university, tips for being successful academically.
- **Active chapter members:** Speaking about strategies that they have found for being academically successful (study habits, communicating with faculty instructors, time management), lessons learned about navigating the college academic experience. OR Create an Academic Mentor Program for your Phikeias where you assign Phikeias to an active member who shares their same major/field of study and have that active member come to the meeting to share successes and challenges in the major/field of study. You can also create other programmatic ways to engage Phikeias with their academic mentor.

Extended Library Tour**Time Varies**

Schedule an extended tour of the library for Phikeias (additionally, feel free to include the entire active chapter in this experience if possible). This can be done by contacting your on-campus library and asking about the possibility of scheduling a tour where the Phikeia can learn about where study space is, where items are located in the library, and what resources are available for them to assist with their academic study through library resources. If you have trouble connecting with the staff of your library, contact your university staff member for assistance on your campus.

WEEK 4: RECTITUDE

OVERVIEW

HOUSEKEEPING:

Phikeia educators will need to **plan ahead** to reserve any spaces on campus and communicate to the chapter, advisers, and speakers dates and times of all meetings for the Phikeia program

- Follow up with Phikeias before meeting to complete Rectitude PDT U module
- Remind Phikeias of their financial obligations
- Plan for the final alumni/guest event for this week, chapter vote, and initiation

EXPECTATIONS:

The Phikeia educator will:

- Assist in the planning of the alumni or guest speaker
- Prepare to discuss the Rectitude module
- Assign committee positions to new members, with assistance from chapter officers
- Understand discussion topics:
 - *The Phikeia Oath*
 - Morrison's Philosophy
 - Definition of Rectitude, why it is a Cardinal Principle
- Host weekly meeting
- Obtain a chapter vote for initiation

| EVENT INFO | RESPONSIBLE OFFICER(S) |
|-----------------------|---|
| Rectitude meeting | Phikeia educator, Phikeias |
| Alumni/guest speaker | Phikeia educator, Phikeias, potential Big Brothers, guest speaker, alumni |
| Final exam and review | Phikeia executive officers, Phikeias |
| Chapter vote | Phikeia educator, chapter, adviser |
| Rectitude activity | Phikeia educator, Phikeias, potential Big Brothers |
| Initiation/event | Chapter, adviser |

FACILITATOR'S GUIDE

MATERIALS NEEDED FOR PHIKEIA EDUCATOR:

Additional materials (if necessary) for selected brotherhood initiatives (see below) and/or selected additional suggested activities.

FOR REFERENCE:

The Manual of Phi Delta Theta, Rectitude Section

SUGGESTED MEETING OVERVIEW:

| TIME ALLOTTED | ACTIVITY |
|---------------|---|
| 10 minutes | Phikeia Oath and Brotherhood Initiatives (Team builders, Energizers, Initiatives) |
| 15 minutes | What is Rectitude? |
| 15 minutes | Service Activity |
| 15 minutes | Ethical Decision-Making or Bystander Intervention |
| 15 minutes | Accountability |
| 10 minutes | Phikeia Business |

APPROXIMATE TOTAL TIME: 80 MINUTES

1. PHIKEIA OATH AND BROTHERHOOD INITIATIVES 10 MINUTES (Brother builders, Energizers, Leadership Development Exercises)

Facilitator Note:

Each Phikeia meeting should begin with the Phikeias reading the *Phikeia Oath* followed by the Phikeia Educator or members of the Phikeia Education Committee facilitating brotherhood initiatives (including team builders, energizers, and or other leadership development initiatives). The purpose of these exercises is to assist the process of the Phikeias getting to know each other during the Phikeia Education program, as well as for the Phikeias to develop trust and brotherhood within the group. See appendix for suggestions to select from.

2. WHAT IS RECTITUDE? 15 MINUTES

Facilitator Note:

The following discussion provides Phikeias with the opportunity to process the content related to Rectitude. Begin the discussion by asking the following questions.

Processing/discussion questions (select from the following):

- According to the online module and the manual, what does Rectitude mean?
- Why do you believe that our founders chose Rectitude as the third Cardinal Principle?
- How do you think Rectitude relates to the other two Cardinal Principles; Friendship and Sound Learning?
- In the module there are a few key words related to the concept of Rectitude: character, integrity, morality, honesty, and loyalty. What does each of these words mean (*please note: this could be a good place to use chart paper or a dry erase word to write down the definitions brainstormed for these words*)?
- What do all these words have in common?
- Ultimately, how do they relate to the concept of Rectitude?
- What does "living a life of value and service" mean? Does it mean something individually for each of you? What does it mean to our organization?
- What does "doing the right thing for the right reasons" mean to you? Again, does it mean something individually for each of you? What does it mean to our organization?
- A Robert Morrison quote is: "To do what ought to be done, but would not have been done unless I did it, I thought to be my duty." What do you think this quote means? How does it relate to our conversation?
- How do risk management and Rectitude relate to one another?
- How do addressing current issues on college campuses for example: binge drinking, substance abuse, student



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- mental health, sexual assault and interpersonal violence relate to the concept of Rectitude?
 - In what ways can we commit to the principle of Rectitude? What examples have you seen already in your Phi Delta Theta experience?
 - In what ways can we hold each other accountable?
 - What is our responsibility to one another? To our organization? To fraternities in general? To society, if we are truly living by our values?

3. DEFINING SERVICE

15 MINUTES

Facilitator Note:

The following provides an opportunity for Phikeias to discuss how they define service while also coming up with a consensus as a group.

Before Facilitation Processing:

(Prior to facilitating the following, feel free to ask some of the following questions:

- How do you define service?
- Do you believe there are different types of service? Why? What types exist?
- In what ways has service shown up in your life?

Instructions:

- Provide each Phikeia with the worksheet on Defining Service; see Appendix "Defining Service."
- Because people define service in many different ways, on the sheet represented are some examples of service.
- Have each Phikeia individually look at the list of activities carefully. They should place a "1" next to the action that most closely models their personal philosophy of service. They will then place a "2" next to the action that is the second closest to their philosophy of service, and so on until every action on the list has been ranked.
- Once everyone has their rankings completed move to the following processing below:

After Facilitation Processing:

(After you have completed the activity, feel free to ask some of the following questions):

- Was it easy or difficult to rank the acts of service based off of your personal philosophy of service?
- Where has your definition of service come from?
- What have been your most meaningful service experiences and why?
- What role does service play in our organization?
- Is it part of our obligation? If so, how?
- Do our intentions for doing service make a difference? Why? For whom?
- Per our previous conversation, how is service connected to Rectitude?

4. GUEST SPEAKER: COMMUNITY SERVICE CHAIR/PHILANTHROPY CHAIR

10 MINUTES

Facilitator Note:

This is a fantastic chance for the Phikeias to understand Sound Learning as more than just the academic component of this tenant. Engaging with either the community service and/or philanthropy chairmen will be important for this.

Instructions:

Have either the community service or philanthropy chairmen or members of their respective committees come speak to the Phikeias on the following topics:

- Importance of giving back in both service-oriented and philanthropic ways. Include some of the annual/larger events that the chapter hosts in these categories.
- Any expectations of Phikeias and members as it relates to service hours and/or philanthropy dollars raised

After he has concluded, allow the Phikeias to ask questions that they have regarding (1) the specific officer role and (2) the chapter operations as it pertains to these two areas.

Facilitator Note:

The following provides an opportunity for Phikeias discussing how part of understanding Rectitude means understanding its relation to morally and ethically sound decisions.

Ethical Decision Making**Before Facilitation Processing:**

(Prior to facilitating the following, feel free to ask some of the following questions):

- Rectitude is not just performing acts of service for others. It is making morally sound and ethical decisions. Based off of this, what are ethics (*ethics relate to behaviors, actions, and specific decisions; are inherently social and often societally defined*)?
- What is the difference between values and ethics (*values relate to beliefs, ethics relate to specific behaviors*)?
- What makes a decision ethical? How do you know if you are making a decision that it is an ethical one?
- What are social norms? How do they relate to our decision-making process?

Instructions:

- Give the Phikeias a couple minutes to think (in silence) about a decision they will need to make soon. This can include any decision regardless of whether they think it is a “big” decision or not. (Note: It does not have to relate to their involvement in the fraternity, it can be any decision they have to make soon).
- Pair the Phikeias up with each other for approximately ten minutes, have them share the decision they came up with that they have to make in the near future.
- Using the worksheet, have them answer the questions presented using the framework on the sheet to help them come to a conclusion for their ethical decision.

After Facilitation Processing:

(After you have completed the activity, feel free to ask some of the following questions):

- Was it easy or difficult to come up with a decision you need to make soon?
- Using the ten questions from the framework provided on the worksheet, were you able to come to a conclusion for your decision? Why or why not?
- What was it like to talk through your decision-making process with one of your Phikeia brothers?
- Why is the way we make decisions significant to our role as members of Phi Delta Theta?
- What do we need from one another in terms of making decisions?
- What role do the values of our organization play in helping us make decisions?

Bystander Intervention**Before Facilitation Processing:**

(Prior to facilitating the following, feel free to ask some of the following questions):

Instructions:

- As college men, we are sometimes in situations where we observe (or partake in behavior) that is not in alignment with the cardinal principle of Rectitude. Have the Phikeias brainstorm a list of situations or behaviors that fit with this description? (Allow the men to provide some examples including (but not limited to): academic dishonesty, binge drinking, violent behavior, destruction, sexual assault, hazing, etc.).
- Once you have compiled this list, have the Phikeias (either in a large group or split up into small groups or dyads) compile a list as to **reasons why** they think in situations that warrant action what keeps good men from doing the right thing?
- Once a list has been compiled, have the Phikeias either share them or write them on a board or chart paper.
- Once they have done this, review the following five reasons why a person does not intervene and ask the Phikeias to provide examples where each of these may be applicable:
 - **Social influence:** When something thinks something is wrong, but doesn't do anything to stop it because no one else did.
 - **Audience inhibition:** Fear that they will embarrass themselves if they take a stand.
 - **Diffusion of responsibility:** Assumption that someone else will do something.



- **Fear of retaliation:** Concern that they will suffer physical or emotional harm by others for intervening.
- **Pluralistic ignorance:** Misjudging other people's inactivity and outward behavior as a reflection of how they feel internally.
- Either have members of the Phikeia Education Committee or invite active members of the chapter to come in to provide examples of situations in which taking action as a bystander has been successful as well as what suggestions you have for the Phikeias. (Please note: this can include creative strategies that have worked in the past). This would be a great time to weave in conversations surrounding alcohol usage and consent, and sexual misconduct.
- Introduce the STOP Model
 - **Safety:** If a Phikeia or brother is in danger, act immediately and involve others. Find brothers who you know will be of assistance and/or call for campus safety/paramedics.
 - **Talk:** Explain your reasoning in a calm, controlled manner to your brothers. Avoid situations where you know the "reason" will not win out. (parties, when members are intoxicated, etc.)
 - **Opposition:** Know who is going to give you the most pushback and be prepared to discuss with them the reasoning behind your decisions. Utilize the brothers in your house that you know will be on your side. Target the members in the house that have the most influence.
 - **Plan:** Make sure you have a strategy in place. Particularly for significant change, ensure that you approach it a well-thought way. Do not introduce anything major immediately without talking to others first and convincing them of the need for change.

After Facilitation Processing (after you have completed the activity, feel free to ask some of the following questions):

- How does bystander intervention relate to the concept of Rectitude?
- How is bystander intervention related to both everyday activities (socializing, being on campus) as well as larger aspects of the experience in the chapter?
- How do we ensure that we are active bystanders as members of the chapter to help protect our brothers, our organization and the people around us?
- Why is this important as members of Phi Delta Theta?

6. ACCOUNTABILITY

15 MINUTES

Facilitator Note:

You may want to incorporate members of the Phikeia Education/Pallas committee into this activity. If the chapter does not yet have an established committee, it is advised that chapter officers and/or Chapter Advisory Board members are invited to help facilitate.

Before Facilitation Processing:

- What is the difference between a brother and a friend?
- While considering the phrase One Man is No Man, what are some ways we can reinforce this with our fellow brothers when their actions may be negatively impacting us?

Instructions:

- An integral aspect of being in Phi Delta Theta is our commitment to upholding our three Cardinal Principles. At times, we may see a brother that may falter in his attempts to enforce all three of the principles. Although this may happen, we must exercise accountability to help guide our brothers toward the path in which they will become the greatest version of themselves.
- Divide the Phikeias into groups of two to three. Once the pairs are created, provide Case Study 1 (in the Appendix).
- Provide the Phikeias with no more than five minutes to read through the case study and discuss the prompt among their pairs. Once the groups have concluded, invite two to three groups to share their response to the situation and prompt out loud.
- Shuffle the pairs to group the Phikeias into different teams than the first half of the activity. Once paired, distribute Case Study 2 (in the Appendix) to each group.
- Give the Phikeias five minutes to read through the case study and discuss the prompt among their pairs. Once the groups have concluded, invite two to three groups to share their response to the situation and prompt out loud.

After facilitation processing:

Bring all Phikeias back into a large group to facilitate the following discussion:

- Was it easy to think of how you would approach each situation?
- Does your response change if it is a less acquainted member versus one of your Phikeia brothers?
- What are some situations you can reflect on since you joined where intervening in an event that needed accountability occurred?
- Who are some chapter leaders you could connect with if brother accountability needed to be explored?

7. PHIKEIA BUSINESS**10 MINUTES****Facilitator Note:**

Phikeia business is a time reserved for chapter-related business each week including information about upcoming events, etc.

Suggestions for additional things to be done during this week include:

- Reminders about Initiation dates and locations
- Review semester progress and accomplishments
- Reminder of Rectitude Activity (see Appendix)

ASSIGNMENTS/REMINDERS:

- Later this week, the Phikeia executive board will not necessarily cover new content, but rather provide as a review and recap for all that we've learned thus far. We will also be using this time to really leave each of you with a personal charge.
- This doesn't mean that we aren't available leading up to the review session to answer questions regarding your assignments. We are always happy to help and clarify anything that you may need.
- It is important to us that you are getting as much as you possibly can get out of this experience.

ADJOURN

FINAL

REVIEW AND EXAM

MATERIALS NEEDED FOR PHIKEIA EDUCATOR:

- Flip chart paper or dry erase board
- PowerPoint presentation

MATERIALS FOR PHIKEIA TO BRING WITH THEM TO THE MEETING:

- *Manual of Phi Delta Theta*
- Laptop or smart phone

FOR REFERENCE:

The Manual of Phi Delta Theta

SUGGESTED MEETING OVERVIEW:

| TIME ALLOTTED | ACTIVITY |
|---------------|-----------------------|
| 15 minutes | History Review |
| 15 minutes | Friendship Review |
| 15 minutes | Defining Service |
| 15 minutes | Sound Learning Review |
| 15 minutes | Rectitude Review |

APPROXIMATE TOTAL TIME: 60-90 MINUTES

FINAL EXAM REVIEW

1. HISTORY 15 MINUTES

- As we discussed during Week 1, Phi Delta Theta has a rich history spanning over 170 years. It is equally important to recognize the important pieces of history that happened before our founding as it provides context of what Greek letter organizations were at that time.
- With Phi Beta Kappa being founded as the first fraternity in 1776 at the College of William and Mary in Virginia, this helped to slowly but surely catalyze the movement of secret organizations within the fabric of our society.
- Following Phi Beta Kappa, we began to see movement further north into areas such as New York. There, at Union College, the Union Triad was founded. Kappa Alpha Society, Sigma Phi, and Delta Phi helped to make up this early trio of Greek letter organizations.
- Leading up to our founding, we can all recall the one monumental movement that helped to spark an idea in our Founders: The Great Snowball Rebellion.
- This event took place in 1848 and involved the members of Alpha Delta Phi and Beta Theta Pi. As the administration became overwhelmed and fed up with the students protesting and barricading the entrance of the administrative building, only one solution seemed possible in their mind: the expulsion of those who were involved, which mainly pulled from the membership of the Alphas and Betas.
- From there, Robert Morrison and John McMillian Wilson came together to start the beginning conversations that would be the formation of Phi Delta Theta. This led to our founding on December 26, 1848. As we have discussed before, the immortal six is made up of Robert Morrison, John McMillan Wilson, Robert Thompson Drake, John Wolfe Lindley, Ardivan Walker Rodgers, and Andrew Watts Rogers.
- Within the following week, in the form of what we refer to as the four historic meetings, the immortal six would go on to create a motto, *The Bond of Phi Delta Theta*, and initiate their first member, Morton George Williams.
- With Phi Delta Theta thriving, a new triad emerged as relations eased between Greeks and the administration: The Miami Triad. The Miami Triad encompasses Beta Theta Pi, Phi Delta Theta, and Sigma Chi—all founded at Miami.
- In the many years the followed after, the organization grew, and the vision of Phi Delta Theta became clearer. Folks who helped that along are those such as George Banta Sr., our first General Council President, and Walter B. Palmer,

the one who helped to conceptualize our cardinal principles.

- Speaking of the General Council, it is important to understand how our organization has been governed for many years. The General Council was founded in 1880 and has governed our organization through changing times ever since. This five-person board helps to set the strategic sites for the organization and, at the end of the day, protect its' best interests.
- This group of individuals is elected every two years when Phi Delta Theta meets for the biannual General Convention.

2. FRIENDSHIP 15 MINUTES

- As we shift and further focus on the three cardinal principles, it is vital that we recognize the importance of understanding and living out these values.
- A way to do that is to surround yourself with both people who live out those similar values and are willing to hold you to your oaths of equally upholding them. This, in simpler form, can be seen through Friendship.
- *Phikeia Oath* Discussion Question: What line or lines in the Oath help to emulate Friendship to you?
- It is imperative that we continue to see the ideal of friendship as one that not only contains camaraderie, but also one that helps to improve us as members of the organization.
- The friendships and bonds that are intended to be created through membership in Phi Delta Theta are lifelong and some of the strongest that you will experience through life. This also helps to emphasize the give and take relationship that a member has with their experience in the organization – you essentially get out what you put in, to a point.
- While considering friendship, the term “brotherhood” is used quite frequently. As friendship translates internally to brotherhood, it drills deeper than a simple friendship may go with just anyone else. For instance, brotherhood helps to bring us together and provide us a sense of belonging but also can come in the form of being your brother’s keeper. We must remember that, although it may be difficult to do in the moment, it is our duty to help our brothers and keep them accountable to their obligations. The better the brotherhood, the easier that this will be to do.
- With friendship, it can also be seen within chapter operations in a handful of ways – most importantly, though, is recruitment. It is the values that we have personally and organizationally that helps to drive our friendship into brotherhood. With that, it is this values congruence that we look at when engaging in the bid decision process during recruitment. By setting standards, such as alignment with our Cardinal Principles, help chapters better refine their recruitment philosophies and strengthens their ability to bring in exceptional new Phis.

3. SOUND LEARNING 15 MINUTES

- As we reflect on Sound Learning and what we’ve learned about it so far, we of course should brush up our understanding of that principal and what it means in our lives as members of Phi Delta Theta.
- Sound Learning isn’t just about making good grades, its about having intellectual curiosity and being active in the search of knowledge, scholastic achievement is just a part of the way you practice this principle
- Alongside being prepared for your academic life, Sound Learning also includes, being open to learning new skills and ideas, the application of new knowledge in various places of your life and becoming effective in setting goals long-term and short-term goals.
- Sound Learning is reflected through various parts of your Phi Delta Theta experience and your chapter or colony should be a place where Sound Learning is actively encouraged through your education and scholarship programs, completion of required PDT U modules, and in your chapters general attitude about learning.
- Just like the other Cardinal Principals, Sound Learning prepares you for success in all areas of your life. From your classes, to your chapter affairs, to your personal relationships with others, Sound Learning makes you more prepared to make the most out of the world and peruse becoming the greatest version of yourself holistically.

4. RECTITUDE 15 MINUTES

- Last of the three Cardinal Principals but certainly not least is Rectitude. We specifically define Rectitude as “a high standard of morality” but it can also be described more generally as moral integrity and correctness of judgment or
- It’s also very closely tied to Morrison’s philosophy “To do what ought to be done, but would not be done unless I did it, I thought to be my duty”
- Understanding and practicing Rectitude is one of the most important and most expansive duties of a member of Phi Delta Theta because it challenges us to be mindful of every decision, we make both inside and out of Phi Delt.
- Within the organization, we practice Rectitude through our involvement with community service and philanthropy , especially with our partnership with the Live Like Lou Foundation, Further, we practice Rectitude with the decisions

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- we make within our organization, including recruitment, social events, and our new member education programs.
 - Outside of Phi Delt, we practice Rectitude through our interactions with individuals on our campus and within our surrounding community. This means expressing kindness and respect to non-members of our organization and ensuring that our events are safe and welcoming to all types of people. It also means being a pro-social bystander, instead of simply not being part of the problems on our college campuses, members of Phi Delt should be a part of the solution, actively stepping in when they see something going wrong, and using bystander intervention skills to address and correct the situation at hand.

Important: With support of our many chapters, we have developed a standardized Phikeia education final exam hosted in PDT U. All of your Phikeias have access to complete the Phikeia Education Final Exam. To pass the test and receive credit, participants most score an 80 percent or higher. This test can be completed multiple times to earn a passing score.

INITIATION

PURPOSE AND PROGRAMMING

- A standardized Membership Initiation Program is part of the Minimum Standards program of Phi Delta Theta to develop a values-driven membership initiation process across all Phi Delta Theta chapters.
- All chapters are to complete one or more of the following recommended program options immediately following the formal membership initiation ceremony. Once the program is completed, it's incumbent on the Chapter President to submit in their monthly report a summary recap of the completed program.
- **Alcoholic beverages are prohibited at any Phikeia program or initiation ceremony of the chapter.**

PROGRAMS TO SELECT FROM:

1. Chapter hosts a lunch or dinner celebration in honor of the newly initiated members at an established restaurant following formal initiation. All newly initiated members and 80 percent of the chapter attends. It is an expectation that the lunch or dinner be alcohol- and substance-free.
2. Chapter hosts a brotherhood-rec center event/sporting activity.
 - » Work with the campus recreation center to schedule a sporting event (or do it on your own on campus) for the entire chapter to participate with the newly initiated members. Examples can include flag football, rock-climbing, ultimate Frisbee, going hiking, dodgeball, basketball, soccer, volleyball, etc. If you are unable to make a connection with your campus recreation center to plan an activity you prefer, contact your university staff member for assistance on your campus.
3. Chapter hosts a Live Like Lou ALS chapter philanthropy event the next morning after initiation that requires all initiated new members and 80 percent of the chapter to attend.
4. Chapter hosts a joint service learning event with a sorority that is approved by the host institution and has a positive impact on the campus and/or local community. All newly initiated members and 80 percent of the chapter are required to attend.
 - » Reach out to your university staff member for help with planning and execution.
5. Chapter hosts a formal banquet at their chapter facility or on campus immediately following initiation where the newly initiated members are welcomed and honored by their parents, alumni, and university officials.
6. Chapter co-sponsors a late-night activity with the campus/university office of student activities/involvement where all newly initiated members and 80 percent of the chapter attends.
 - » Activities could include a movie marathon, video game tournament, board games, casino night, etc.
7. Chapter attends a campus and/or professional sporting event where with all newly initiated members and 80 percent of the chapter in attendance.
8. Chapter attends a campus or community music concert where all newly initiated members and 80 percent of the chapter attends.
9. Chapter plans and executes a trip to a local or regional amusement park where all newly initiated members and 80 percent of the chapter attends.
10. Chapter hosts an alcohol- and substance-free brotherhood night where the entire chapter provides at least one positive reason they are "Proud to Be a Phi." All newly initiated members and 80 percent of the chapter attends.

POST-INITIATION MEMBER DEVELOPMENT

OVERVIEW

OBJECTIVES:

Newly initiated members will be able to:

- Acclimate as an initiated member of the chapter to chapter operations
- Understand and explain ritual and its importance
- Define membership expectations
- Select an area of the chapter to enhance through serving on a committee or running for election

HOUSEKEEPING:

- An initiation report needs to be completed through myPhiDelt
- Confirm that *The Bond*, financial roster, university roster and myPhiDelt roster are consistent
- All dues should be collected or accounted for through the treasurer

EXPECTATIONS:

The Phikeia educator will:

- Work with the Big Brothers and warden to successfully teach ritual and the meaning of ritual to each newly initiated brother
- Confirm completion of the initiation report through myPhiDelt
- Confirm that all Phikeias have been placed on a committee within the chapter
- Continue the mentoring relationship with new members to make sure each member is held accountable to the expectations of membership and given the rights and privileges of membership
- Develop opportunities of continued education for all members of the chapter but specifically the newly initiated members of the chapter
- Schedule a call with the GHQ liaison to discuss the completion of the program
- Both Pursuit of Greatness Leadership Badges are expected to be completed before new members finish their first year of membership

POST-INITIATION PROGRAMMING:

Week 1: Topic areas may include: Ritual discussion, practicing of Ritual, Fraternity's secrets discussion, chapter history.

| POTENTIAL EVENTS | DESCRIPTION | RESPONSIBLE OFFICER(S) |
|-----------------------|---|---|
| Ritual Review | General overview of the weekly usage of Phi Delta Theta Ritual, proper execution, and the explanation of the meaning of each part. | Warden, big brothers, Phikeia educator |
| History Behind Ritual | An understanding of where the Ritual of Phi Delta Theta comes from, the changes that it has went through, and the importance of carrying on both the written and unwritten secrets of the Fraternity. | CAB chair, province president, Phikeia educator |
| Ceremony Review | General overview of the various ceremonies located within the Ritual. Not all ceremonies need to be conducted during this but should be walked through by the appropriate officer(s). | Warden, big brothers, Phikeia educator |

Week 2: Topic areas may include: local chapter history, local founders, prominent chapter alumni, chapter house history, campus history as it relates to Phi Delta Theta, and anything else that could be applicable here.

*It is encouraged that the chapter identify an alumnus or utilize resources from the Phi Delta Theta archives to support this effort.

| POTENTIAL EVENTS | DESCRIPTION | RESPONSIBLE OFFICER(S) |
|-----------------------|---|---|
| Local Chapter History | A session explaining the history of the local founding including but not limited to: local founders, local founding year, accomplishments/impacts of the chapter and its' members since its' founding, campus connections, and more. | CAB chair, province president, chapter officers, Phikeia educator |
| Alumni Panel | A panel including alumni from either varying years/decades or influential alumni from the chapter. The panel would discuss, at minimum, their chapter experience, leadership skills learned through membership in Phi Delta Theta, advice for younger members. | Alumni members of the chapter, Phikeia educator |
| Campus Tour | Landmarks, budlings named after chapter alumni, and other Phi Delta Theta related campus areas may be explored. While at each stop, a knowledgeable member of the chapter and/or university historian should provide background of the site as well as the connection to the chapter. | Chapter officers, CAB members, university staff, Phikeia educator |

Week 3: Topic areas may include: cross-campus relationships, how to plan and host a safe/effective event, interfraternal/ community involvement.

*It is encouraged that the chapter identify a local professional with expertise in the above items.

| POTENTIAL EVENTS | DESCRIPTION | RESPONSIBLE OFFICER(S) |
|---|---|--|
| Academic Appreciation Dinner | A dinner held at the chapter facility/a campus or local space. Members can invite professors and/or academic support staff that have made a positive impact on their education. Each invitee should receive some sort of certificate/ memento to show the chapter's appreciation. | Scholarship chair, president, vice president, Phikeia educator |
| Fraternity/Sorority Life Staff Meet and Greet | Host a chapter meet and greet with the Fraternity/Sorority Life Office staff at your local campus. Inviting all members of the staff and the chapter will provide an opportunity to have rapport building conversations. | President, vice president, Phikeia educator |
| Cross-Council Event | Collaboration with a chapter in a different council than your own (IFC) to hold an event. It is encouraged to consider groups that the chapter has not paired with before, especially if the campus has a NPHC, MGC, or other culturally based council. | President, social chair, community service chair, philanthropy chair, Phikeia educator |

Week 4: Topic areas may include: self-care habits, mental health stressors related to collegiate life, resources locally/ on-campus to seek support, peer-to-peer support. It is encouraged that the chapter identify a local professional with expertise in the above items or professionalism, resume building, internship/interview tips, approaches to make successful connections within the first year.

*It is encouraged that the chapter identify a local professional with expertise in the above items.

| POTENTIAL EVENTS | DESCRIPTION | RESPONSIBLE OFFICER(S) |
|--------------------------------|---|--|
| Men's Mental Health Discussion | Hold a discussion that focuses on men's mental health, relevant statistics, behaviors to be aware of, ways to intervene, and actions that can improve one's mental health. | Local/campus mental health professional, CAB members, Phikeia educator |
| Campus Support Information | Collaborate with campus offices to educate members on the services available on campus, reasons to engage in utilizing these services, and steps to if the need were to arise. | University staff member, chapter president, Phikeia educator |
| Your Brother's Keeper | Have members complete the bystander intervention module offered within PDT U. Upon taking this module, members should discuss their reaction to the information learned, ways that they will apply this information in the future, and the risks not acting in a time of need would pose. | CAB members, risk manager, Phikeia educator |

Additionally, all Phikeias initiated within the academic year need to complete the following PDT U modules before May 1: Your Brother's Keeper: Bystander Intervention, Our Obligation: Diversity and Inclusion, and Leadership in Action.

| MODULE NAME | DESCRIPTION |
|---|--|
| Your Brother's Keeper: Bystander Intervention | This course is designed to provide you important education and skills necessary to intervene in high risks situations while a member of Phi Delta Theta. |
| Our Obligation: Diversity and Inclusion | Participants will identify who they are, appreciate differences in others, learn from these differences, and apply best practices to cultivate a more diverse and inclusive environment for their communities and Phi Delta Theta. |
| Leadership in Action | Participants will understand, identify, and apply proactive strategies to address positive, healthy membership experiences vested in a commitment to care for all members. |

APPENDIX

CHAPTER LETTER TO PHIKEIA'S PARENTS EXAMPLE

To the parents of new members of Phi Delta Theta:

It is our pleasure to welcome your son to the **University of Alaska** campus and especially into our house of Phi Delta Theta Fraternity. These men are about to embark upon one of the most important and rewarding experiences of their life. The active brothers of Phi Delta Theta take it as an honor and responsibility to be a part of this time.

Our goal as Phikeia educators is to enhance the education and development of your son during his first semester here and throughout college. They will most certainly face challenges academically, socially, emotionally, and others here at the university. We are here as a fraternity to lend help during these times and provide guidance from members who have dealt with the same situations. We have adopted a zero tolerance hazing policy and alcohol-free housing here at Phi Delta Theta. We take pride in these rules and understand their importance. Our Fraternity will allow for a smooth adjustment to college life and augment their experience here.

The Phikeia Education Program will focus on our Fraternity's three Cardinal Principles: Friendship, Sound Learning, and Rectitude. Each **Monday** night, the Phikeias class will meet and run a meeting. They will elect officers who have specific roles in the business of their pledge class. They will study the history and principles of our Fraternity and take a test each **Monday** night. In addition, your son, along with the other Phikeias, will plan and execute **a community service project and a house improvement undertaking**. They also have the opportunity to participate in campus intramurals and will be encouraged to join a university organization or club. Furthermore, during the fall they will have a weekend Phikeias retreat as well as the opportunity to visit other Phi Delt chapters, most likely at a **UA** football away game.

One of the greatest assets our Fraternity offers is the opportunity for mentorship from the older members of our chapter. Personally, this was one of the best ways I adjusted to college life and made close friends for life. Your son will be paired with a **Big Brother** in the Fraternity who will mentor them through the **fall**, and throughout his college experience. This relationship offers help with classes, a smooth transition into college, a role model and friend, and the list goes on.

Alaska Alpha is committed to the development of our Phikeias because they are the future of our Fraternity. We do not haze because we believe we can build them to greater heights and mold them from the unique talents and personalities they offer. We take honor in producing the finest Fraternity men on the **University of Alaska** campus. Congratulations on your son taking this challenge and choosing to become among the elite at the **University of Alaska**. If you ever have any questions, please do not hesitate to contact the Phikeia educator. We look forward to working with your son this **fall!**

Sincerely,

Full Name

Chapter

Email Address

BIG BROTHER LETTER TO PHIKEIA'S PARENTS EXAMPLE

To the parents of (Pikeia's name),

My name is **First Name Last Name**, and I have the honor of serving as your son's Big Brother for the Phi Delta Theta Fraternity. We are very proud and excited that **Pikeia's First Name** decided to join our chapter and we look forward to contributing to his growth and development as a member of the **University of Alaska** community.

As **Pikeia's First Name's** Big Brother, my job is to coach and mentor him during his transition to college and his pursuit of academic and professional endeavors. In addition, I will be a resource and adviser to him for anything related to the Fraternity. It is the goal of our Big Brother Program to cultivate leaders on our campus and to prepare our men for life and success after college.

Joining Phi Delta Theta was one of the best decisions in my college career, and I sincerely hope that your son will reflect on his experiences after graduation and come to the same conclusion. We hope that you will be able to visit us throughout your son's time here at the **University of Alaska**, and take pride in the fact that **Pikeia's First Name's** growth, development, well-being, and safety are at our utmost priorities.

If you should have any questions about our education program, or if you find that **Pikeia's First Name** is having any difficulties in school or fraternity, please do not hesitate to contact me.

Sincerely,

Full Name
Chapter
Email Address

RISK MANAGEMENT POLICIES

The Risk Management Policies of Phi Delta Theta are intended to provide education and guidance to chapter officers in performing their responsibilities. Individual chapter members and officers are responsible for being familiar with these policies.

** Warning: Failure to abide by the Fraternity's Risk Management Policies will result in the loss of any insurance coverage that may otherwise be available under the Fraternity's insurance. It may also result in the loss of your chapter's charter and/or individual membership.*

Abusive Behavior

Phi Delta Theta has high expectations for the conduct of its members. It is not in conformity with Phi Delta Theta expectations that any member or Phikeia would engage in abusive behavior against anyone. Similarly, it is beneath the dignity and standards of Phi Delta Theta for any member or Phikeia to engage in fighting.

One example of unacceptable, abusive behavior is sexual harassment. Sexual harassment may be directed against a member of either the opposite sex or same sex. It may occur as part of hazing in a group or in a social one-on-one situation. Sexual harassment may include intimidation, bullying or coercion of a sexual nature or the unwelcome and inappropriate promise of rewards

Alcohol-Free Housing, Misuse of Alcohol and Drugs

All chapter facilities and properties in Phi Delta Theta Fraternity shall be alcohol-free at all times and under all circumstances. The implementation of these procedures is a continuation of the ongoing educational efforts of the General Fraternity.

1. The possession, use and/or consumption of any alcoholic beverages by any Fraternity member, Phikeia, or guest, during chapter activities, or in any situation sponsored or endorsed by the chapter, must be in compliance with the laws and ordinances of the state, province, city, county, and university/college.
2. The presence of alcohol products above 15% ABV is banned from any and all Phi Delta Theta chapter sponsored or co-sponsored events; except when served by a third-party licensed vendor.
3. No chapter of Phi Delta Theta may purchase alcoholic beverages with Fraternity funds, nor may any member or Phikeia in the name of or on behalf of the chapter coordinate the collections of any funds for such a purchase. This includes, but is not limited to, the following: the purchase of kegs, party balls, and other bulk quantities of alcoholic beverages.
4. No chapter of Phi Delta Theta may co-sponsor or co-finance a function where alcohol is purchased by any of the host chapters, groups or organizations.
5. The use or distribution of kegs or party balls by the chapter at chapter events is strictly forbidden.
6. The sale of alcoholic beverages by any chapter of Phi Delta Theta is strictly forbidden. No chapter of Phi Delta Theta shall participate in any activity or action which creates the impression that the chapter is selling alcohol.
Examples include, but are not limited to: charging admission to parties, passing the hat, selling empty cups, selling drink tickets, or having vending machines which dispense alcoholic beverages.
7. The use or possession of any unlawful drug in any form is not permitted at any Phi Delta Theta function or in any Phi Delta Theta chapter facility.
8. Parties and social activities should be open to members, Phikeia, and

invited guests only. Open parties, meaning those with unrestricted access by nonmembers of the Fraternity, without specific invitation, are prohibited.

9. All undergraduate recruitment functions and recruitment activities associated with or sponsored by any club/association of Phi Delta Theta will be alcohol-free.
10. Alcoholic beverages are prohibited at any Phikeia program or initiation ceremony of the chapter.
11. Chapters are strongly encouraged to conduct alcohol and drug awareness programs for members and Phikeia.

Hazing

No chapter or member of Phi Delta Theta shall indulge in any physical abuse or undignified treatment (hazing). Hazing is defined as: "any action taken or situation created, intentionally or unintentionally, whether on or off Fraternity premises, and whether with or without the consent of the persons subjected to the action, which produces mental or physical discomfort, embarrassment, harassment, or ridicule." Such activities and situations include: paddling in any form, creation of excessive fatigue, physical and psychological shocks, quests, treasure hunts, scavenger hunts, road trips, or any other such activities carried on outside the confines of the chapter facility, wearing apparel in public which is conspicuous and not normally in good taste, engaging in any public stunts and buffoonery, morally degrading or humiliating games and activities, late work sessions which interfere with scholastic activity, and any other activities which are not consistent with fraternal law, ritual, or policy with the regulations and policies of the educational institution.

High-Risk Events

Experience indicates that certain events are of such high risk and the consequences of injuries from engaging in them so devastating that such events are prohibited on Phi Delta Theta property or at Phi Delta Theta-sponsored events. These events can include mud bowls, boxing, wrestling, temporary pools, slip-n-slides, or any water related activities. Additionally, Phi Delta Theta chapters shall not sponsor high-risk events with mechanical bulls, bungee jumping, sky diving, parachute jumping, bouncy houses or similar activities.

The possession and/or use of firearms or explosive devices of any kind are expressly forbidden within the confines and premises of the chapter house or at any Phi Delta Theta events. Any projectile propulsion devices, even apparently safe things like water balloon launchers, can be dangerous if misused. Three-person slingshots, crossbows, and potato guns are expressly forbidden within the confines and premises of the chapter house or at Phi Delta Theta events. The negligent use of other forms of projectile propulsion devices, particularly any such use that causes damage or injury, shall be treated as a violation of this risk management policy.

Any temporary structures, including stages, bridges or similar structures, at any Phi Delta Theta events whether on Phi Delta Theta property or located elsewhere, must be constructed by licensed professional contractors with proof of acceptable general liability coverage and the work must be performed pursuant to a written contract. Chapter leaders must recognize that these prohibited events do not constitute an exhaustive list of activities to be avoided.

Chapters must take a common sense approach to evaluating the risk of any events or activities. Should there be any doubt about a particular activity or

event, chapter leaders should contact the insurance and safety coordinator at Phi Delta Theta General Headquarters.

Property Management

The chapter facility, along with its furnishings and landscape, should provide for each member an environment for study, clean and safe living conditions, and recreational facilities. A sound program focused on proper maintenance of the property, along with due regard for university/college, health, or fire department regulations, where applicable, shall be followed in each chapter.

Members' Personal Property

Use of personal property in Fraternity activities shall be strictly voluntary and the sole responsibility of the owner. The Fraternity assumes no liability or responsibility for any loss or damage to any personal property of members even if used in conjunction with Fraternity activities.

Automobiles and Transportation

Phi Delta Theta chapters are encouraged to establish a transportation policy for chapter events which are not held at or within walking distance from the chapter facility. It is strongly recommended that the policy include the use of a form of mass transportation, such as charter buses, professional drivers, limousine services, taxis, etc. to transport members for such events, and particularly for events where alcohol may be consumed. Any individual who provides transportation in conjunction with Fraternity activities *does so at their own risk*. They are responsible for their own conduct. No member or Phikeia shall be required to provide transportation and any member or Phikeia who provides transportation shall do so only if it is voluntary. Members or Phikeias shall obey all applicable motor vehicle laws, including, but not limited to, those concerning vehicle safety, vehicle operation, financial responsibility and/or insurance, and the transportation and consumption of alcoholic beverages. Operators shall ensure that vehicles are properly maintained, not overloaded, and are operated in a safe manner. Rental vehicles shall be operated in accordance with rental contracts. Use of

personal vehicles shall be strictly voluntary and the sole responsibility of the vehicle owner/operator. Financial responsibility laws generally impose responsibility for accidents on the driver or owner of vehicles. The Fraternity assumes no responsibility or liability and provides no insurance to drivers or owners of vehicles for accidents or injuries, or for any damages to vehicles not owned by the Fraternity that may be used in conjunction with Fraternity activities.

Contractual Agreements and Additional Insured

No chapter, member, or housing organization may enter into any written or oral contract or financial agreement using the name of the Fraternity. This includes without limitation such agreements as leases, contracts, hold harmless agreements, liability releases, account statements, purchase orders, and hotel or banquet contracts. As the Fraternity's insurance does not afford protections *to outside individuals or entities*, no chapter, member, or housing organization may enter into any written or oral agreement under which the responsibility or liability of some party other than the Fraternity is assumed. Additional Insured status under the Fraternity's insurance requires the prior agreement of both the Fraternity and its insurers.

Issued by the General Council September 2018



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PHI DELTA THETA ANNEX AND CHAPTER LIABILITY

Greetings from the birthplace of Phi Delta Theta! Over the past several years, several undergraduates have raised questions regarding the alcohol-free housing policy and the legality and liability surrounding "annex" parties. We all should keep in mind the spirit of the alcohol-free policy is to refocus on the founding principles of Phi Delta Theta.

What is a chapter event?

The majority of the questions raised regarded the definition of a chapter event and what is considered an official Phi Delta Theta annex. Phi Delta Theta does not have a definition for a chapter event, leaving this jurisdiction to your school or IFC alcohol/event guidelines and ultimately up to a Judge in a court of law if it happens to get that far. Remember, a judge has the privilege of making up his mind after all the facts are told.

In order to help you understand what could be considered a chapter event by a court of law, please consider the following questions:

1. Was it pre-planned or pre-meditated?
2. Was it discussed during a chapter meeting?
3. Did the majority of the chapter know about the event?
4. Were a significant number of members present at the event?
5. Were a significant portion of those who attended the event invited by members?
6. Were chapter funds used in any way? (i.e. entertainment, food, beverages, decorations, etc.)
7. Did the chapter officers help plan the event?
8. Did it occur in concert with a Fraternity function (i.e. big brother night celebration, post-initiation party, etc.)

What could be considered a chapter annex?

Merriam-Webster's dictionary defines an annex as "a subsidiary or supplementary structure." Often chapter brothers use the term "annex" very loosely in conversations. Several brothers renting an apartment or a house on- or off-campus does not automatically mean it is an annex of the Phi Delta Theta chapter house and should not be referred to as such.

Common test questions a court may look at in considering imposing liability on Phi Delta Theta could include:

1. Is the property owned, rented, or leased by your chapter or house corporation?
2. Do you permit the location to have Phi Delta Theta Greek letters displayed on the property if it is not leased by a chapter or house corporation?

No letters should be allowed to be displayed unless the facility is owned, rented, or leased by your house corporation or your chapter.

3. Does the chapter hold chapter meetings or other chapter events on the property?

If one or more of the above questions could be answered "yes" then this property may fall under the scope of the alcohol-free policy.

Remember the risk management policies of Phi Delta Theta must be followed at all times, including the alcohol-free housing policy. Remember: Your insurance coverage is void if violations of the risk management policies occur. Any other insurance available to you is primary at all times.

Liability for brothers living outside of the chapter facility.

Those brothers living outside of the chapter facility need to be aware of the potential liability they face by hosting any type of social event whether it is Fraternity related or not. This is called "social host liability" which requires the host of an event to provide a safe atmosphere for his guests. This would include following local and state laws (not serving minors, etc.) and providing your guests safe transportation home after the event. By ignoring these duties the host may be found negligent and could be held liable in a court of law.

Event Planning is a great resource.

Keep in mind that the same careful planning of events hosted on chapter property must be in place for all chapter events no matter where they occur. A tool to assist you in the planning of any activity is the Event Planning Program.

In order to alleviate your worries or concerns continually educate your chapter, especially new Phikeias, on the risk management policies and explain to them the potential consequences of their actions, specifically if local and state laws are not followed.

Please discuss this information with your chapter members at your next meeting. Additional resources are available through General Headquarters, and our traveling leadership consultants can provide information and assistance to your chapter. If you have any questions please feel free to contact me at General Headquarters.



Emily Wolfzorn
Director of Chapter Support
ewolfzorn@phideltatheta.org

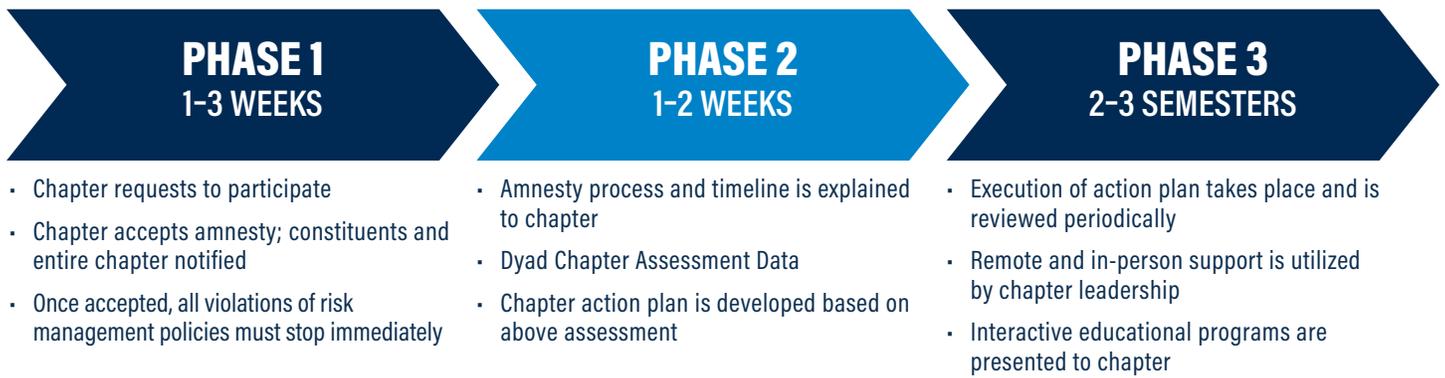


PHI DELTA THETA AMNESTY PROGRAM

PURPOSE:

To offer an opportunity for any chapter that is concerned with their commitment to Phi Delta Theta's **Risk Management Policy** and wishes to seek help in developing a more positive values-based experience for their members and Phikeias in accordance with the Cardinal Principles and risk management policies of the Fraternity.

EXECUTION FLOW:



PHI DELTA THETA
**ANTI-HAZING
PHILOSOPHY**
★ ★ ★ ★ ★

ESTABLISHED 2000
**ALCOHOL
FREE HOUSING**
PHI DELTA THETA
★ ★ ★ ★ ★

WHO CAN PARTICIPATE?

Any chapter with a sincere interest in reform may choose to participate.

WHEN:

The opportunity to participate in the amnesty plan is open ended. At this time, there is no 'end' date.

PROGRAM DETAILS

REQUEST TO PARTICIPATE:

- a. A request to participate should preferably come from the **chapter president** or any **chapter officer**. It is recommended, that at a minimum, he have the support of the chapter's executive board. Further, if the chapter membership is in agreement, this would demonstrate a strong commitment to the plan.
- b. A concerned **group of members** that are opposed to current chapter practices but lack chapter leaders willing to participate in the amnesty plan may request participation. In this scenario the outcome may result in some officers being removed from their positions and other disciplinary measure deemed appropriate.
- c. A request or report from a **single member** of the chapter would fall into the 'whistle-blower' category and would **exclude** the chapter from having the opportunity to participate in the amnesty plan. Should a chapter be caught in the act of violating a risk management policy, this would also **exclude** the chapter from accepting amnesty.

CONTACT:

A request to participate in this plan can be made in person at any of our Fraternity events, by telephone, by e-mail, or by mail. The request must be made to a General Council member or a General Headquarters staff member or facilitated by your chapter's province president. It cannot be anonymous.

PROCEDURE AND IMPLEMENTATION:

1. Once a request has been made and it is confirmed as legitimate, the director of chapter services or chapter support coordinator will do a preliminary assessment of the situation with the member (or members) who initiated the contact. This assessment will require an honest and candid dialogue about the chapter's noncompliance with the risk management policies. Each chapter may pose unique issues and therefore the procedure will vary in execution.
2. The province president will be contacted and notified if one of his chapters has accepted amnesty. The local

alumni, namely the chapter advisory board chairman, will be contacted by the province president.

3. Upon self-accepting amnesty, the entirety of the chapter is to be notified within forty-eight hours of acceptance by the group of members who sought amnesty.
4. A visit may be made to the chapter to discuss the expectations of participation in this plan with all the members (including Phikeias).
5. Each chapter poses unique issues and cultural norms, therefore, regardless of the nature of the reason for amnesty, a custom action plan will be developed by the General Headquarters chapter support staff, province president, chapter, and university official to provide the chapter with the necessary tools and support to change the chapter's culture and self-accountability. **See next page for a list of potential resources and support for a chapter in the amnesty program.**
6. Once the chapter has accepted amnesty, all Risk Management violations must stop. A retreat may be necessary to begin shifting culture towards policy adherence and self-accountability. Ideally, the retreat should be done with an undergraduate committee facilitated by General Headquarters staff and/or the province president. This committee should represent an appropriate cross-section of chapter members.
7. Unfortunately, some chapters may incur resistance from some members. Should this occur, individual member interviews may be necessary to identify, and possibly remove, those members who become a roadblock to the chapter's success by not agreeing to the amnesty plan and necessary cultural changes.

ADDITIONAL INPUT:

The General Council and General Headquarters staff recognize the issues involving alcohol, hazing, and other conduct issues on a college campus. We are continually searching for new ideas and activities that are positive and work well within the college environment. If anyone feels they can offer something for others to potentially use, please contact the General Headquarters staff or your chapter support consultant.

RESOURCES:

- **Dyad Assessment:** A data driven analysis that measures and compares each chapter's culture to the organization as it relates to brotherhood, health and safety, ethics, and commitment.
- **Fraternal Health and Safety Initiative:** A comprehensive suite of Risk Management presentations by Phi Delta Theta's insurance broker Favor & Company.
- **CHOICES:** A facilitated presentation to educate members on the risks of improper alcohol or illicit drug usage.
- **Hazing Prevention:** A facilitated presentation to define hazing, break down myths, discuss chapter values, bystander intervention, and establish a commitment against hazing.
- **Hazing Intervention:** A facilitated presentation to understand the impact of a chapter hazing incident, define hazing, discuss the role alcohol plays in hazing, discuss the legal ramifications of hazing, learn about bystander intervention, and establish a commitment against hazing.
- **Taking a Stand: Preventing Sexual Misconduct on Campus:** A facilitated presentation challenging chapter members to recognize the warning signs of and best practices on how to intervene in a situation where sexual misconduct may occur.
- **Be Your Brother's Keeper:** Interactive course that helps each member develop strategies and skills for taking action to prevent others from causing harm to themselves or others.
- **Chapter Strategic Planning:** Interactive process that will streamline planning for your chapter. In this instance, the planning will be focused on the chapters struggles that led to seeking enrollment in the Amnesty Program.
- **Risk Management Presentation:** An in-depth facilitated presentation on Phi Delta Theta's risk management policies.

- **Stop Light Hazing Activity:** A chapter-wide presentation and activity on addressing the cultural norms of hazing that may exist in a chapter.
- **Why Alcohol-Free Housing?:** A document that outlines the seven reasons why alcohol-free housing was implemented in 2000 and the benefits its implementation has had on the organization since then.
- **Campus Based Resources:** Each campus will have unique resources on campus that may assist in cultural change. Such examples could be activities such as chapter-wide Green Dot Violence Prevention Training, It's On Us participation, conflict resolution activities, mental health education.

SUPPORT:

- A General Headquarters staff member(s) within chapter support will work with the chapter leadership on a recurring basis, typically ranging from weekly to bi-monthly on the execution of the chapters unique action plan, this is primarily done via phone calls or a web conference such as Zoom.
- The province president and chapter advisory board will be kept up-to-date on the chapter's acceptance of amnesty, and depending on the uniqueness of the situation, will provide support as deemed necessary.
- The appropriate university official will be kept up to date on the chapters acceptance of amnesty. It is recommended that the chapter leadership seek to meet with this official monthly during the chapters acceptance of amnesty.
- *Dependent upon the nature of the amnesty, additional in person support from a General Headquarters staff member, such as the chapter support coordinator, may take place.*



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PHI DELTA THETA GOOD SAMARITAN POLICY

The health and safety of our members and guests is of primary concern for Phi Delta Theta. Any time a member or guest is injured or displays signs of physical distress, our members have a duty to “do what ought to be done” by intervening to seek appropriate professional assistance for the person(s) in distress. Thus, Phi Delta Theta encourages its members to act as Good Samaritans.

A Good Samaritan:

1. Calls 911 or seeks on-site assistance if such assistance is readily available.
2. Stays with the person in distress until that party has been physically taken into the care of emergency service professionals (police, fire, ambulance, medical).
3. Reports the incident to the crisis hotline at (513) 523-6345, option 8.

Applying the Good Samaritan Policy if a Risk Management Policy violation has occurred:

If the injury or distress occurred as a result of a violation(s) of Phi Delta Theta’s Risk Management Policy, which may include hazing, intoxication, and/or dangerous behaviors, an exercise of the Good Samaritan policy will be considered as extenuating circumstances.

Investigation by the General Headquarters after an exercise of the Good Samaritan Policy has been reported:

- The member(s) and/or chapter will cooperate with the Fraternity to determine whether a violation of the Fraternity’s Risk Management Policy occurred.
- If the chapter followed the Good Samaritan Policy, that may be used to appropriately adjust the educational sanctions imposed upon the chapter or member(s).

The Good Samaritan Policy is not invoked if any of the following occur:

- Members wait until the police or other authorities arrive before seeking appropriate emergency assistance.
- If the emergency personnel are summoned by the police.
- The incident is reported to Phi Delta Theta by someone other than the chapter or individual member(s) seeking to utilize the Good Samaritan Policy.

DEFINING SERVICE

People define service in many different ways. Represented below are some examples of service. Study the list carefully. Place a "1" next to the action that most closely models your personal philosophy of service. Place a "2" next to the action that is the second closest to your philosophy of service, and so on, until you have ranked every item up to 15.

- _____ Volunteering to read to elementary school students
- _____ Joining the armed forces
- _____ Providing dinner once a week at a homeless shelter
- _____ Talking about a friend about a social issue that is important to you
- _____ Working for a candidate in an election
- _____ Biking to school or work every day
- _____ Donating money to a local charity
- _____ Giving blood
- _____ Adopting a child
- _____ Voting
- _____ Working as a state legislator
- _____ Doing yard work for elderly individuals in the community
- _____ Mentoring at-risk youth
- _____ Picking up trash along a local hiking trail
- _____ Sorting donations at Goodwill or a local thrift store

CASE STUDY 1

Scene: You are a general chapter member at your chapter's mid-semester formal.

You notice that an older member of the chapter has been providing underage Phikeias shots of hard liquor earlier in the night during your chapter's formal. The Phikeias are observably intoxicated, with one having to be asked to leave by the risk manager.

Later in the evening, you witness the same member handing a flask to two underage Phikeias while you were walking to the restroom. Consider the following prompts:

- What risks do that activities that you have witnessed pose to the chapter? The individual members?
- How would you navigate intervening in this situation?
- What are some ways that these actions could have been prevented/stopped early on?

CASE STUDY 2

The day after social event, you overhear member is bragging to brothers at the chapter house about hooking up with very drunk woman. A couple of the members recall & even snap him hitting on the woman on the dance floor, making out with her, and touching her all over.

Brothers are intently listening as he shows them a snap of part of the hookup, which he mentions that she did not know that he recorded. Everyone is laughing except for a couple of members, who are visually disgusted. They look at each other, but then just shake their head and leave the room.

Consider the following:

- What specific elements of this scenario are risky, potentially dangerous, or dangerous?
- How would you navigate intervening in this situation?
- Why is it important to call out this culture among our own brothers?
- How can situations like this impact the chapter? The individuals involved?



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