



PHI SIGMA KAPPA

BIENNIUM REPORT

JULY 26, 2017

Scott Jacobson, Grand President

I have been extremely proud to have served as your Grand President over the last biennium. From the beginning of my term I expressed three goals—improve the undergraduate experience; utilize a strategic and effective business growth model; and improve the fundraising activities and create a culture of giving.

I have also made it clear that we are stewards of an organization that was founded in 1873 and we have a responsibility to leave it better than we found it. We can no longer operate as “business as usual.” If we do, Phi Sig will flounder and the future of our organization will be uncertain. With this in mind, over the past two years we have made bold decisions, which I believe will propel our fraternity forward.

I believe you will see from the items outlined below that the Fraternity has taken some great strides forward.



New Brand – Family Of Leaders – Cardinal Men

We embarked on a branding initiative and hired an outside firm to help us find our true identity. It's important for Phi Sig to have a look and feel that is current and speaks to undergraduates and alumni today. After interviewing major stakeholders within our fraternity and working for the better part of a year with staff from the International Headquarters, you saw the reveal of our new branding at Wednesday's opening banquet. We are proud to be known as a "Family of Leaders" and "Cardinal Men" and we will strive to develop educational programming for both undergraduates and alumni that will help ensure that we "walk the talk."

With the branding effort, you will also see a new website, new email templates, new apparel, and a brand new Signet. We are excited about this new face of Phi Sigma Kappa and we hope you will be too!

New Chief Operating Officer

We are excited to announce the hiring of Nicholas Zuniga as the next Chief Operating Officer for Phi Sigma Kappa!

We feel extremely confident in Nick's ability to lead us forward in a dynamic way. He currently serves as the Director of Chapter Services for Lambda Chi Alpha, of which he is a member. He has led a team of 21 professionals in exceeding their leadership programming, alumni engagement, expansion and chapter services goals. He is responsible for overseeing the operations for more than 200 chapters, 21 staff members and a budget in excess of 2.5 million dollars.

Nick's experience, energy and enthusiasm came through loud and clear through our search process. He has a deep passion for the fraternal experience and is prepared to lead our staff toward some ambitious goals. Nick is the right person at the right time, and we are confident in his ability to push Phi Sig to the next level. Our undergraduate and alumni brothers deserve someone with his experience to move us forward.

Organizational Design Effort

The sign of a strong organization is the ability to measure itself and look for ways to continuously improve efficiency, effectiveness, productivity and communication. We have identified the need to streamline our structure, improve our communication and enhance our transparency to ensure clarity and focus as we work to eliminate boundaries to realize our common goals.

The new structure will help drive organizational goals by streamlining our structure by eliminating boundaries to enable success; increasing the efficiency and speed of communications; fostering improved alignment and engagement with members with a more modern approach as we re-evaluate and solidify the image of the Fraternity and vision of the future; strengthening the overall effectiveness of our communications and drive to be an organization that has clear expectations, accountability and strategy; establishing criteria for all boards and their members to assist with the ongoing effort to engage and support effective leaders in these volunteer positions. Already we have:

- Held Mandatory Board training for each board
- Adopted onboard training for new directors
- Held Monthly meetings with the Presidents of all three boards to foster transparency
- Changed staff structure and roles at HQ to ensure ongoing productivity
- Re-aligned communications, the website and materials to better reflect who we are



GreekLifeEdu

In the fall of 2015, the Fraternity entered into a partnership with EverFi. GreekLifeEdu is EverFi's premier online learning platform addressing the critical issues of alcohol awareness, sexual assault, and hazing for incoming fraternity and sorority members. By leveraging the latest research and trends and incorporating multiple evidence-based learning theories, GreekLifeEdu achieves behavior change objectives and helps students practice safe decision-making. We made a decision to require all members to take this online program as a condition of membership to Phi Sigma Kappa. We have sent a message to prospective members, parents, alumni, and university officials that Phi Sigma Kappa is committed to fostering education and the positive growth of our young brothers.

myPhiSig

In 2016 Phi Sigma Kappa announced that it was going to create a members' portal, myPhiSig, which launched at the 2016 Shonk Leadership School. The new portal put in place a system that revolutionizes the way the Fraternity stores data, communicates with members and much more, as we advance into the future.

To date, it is estimated that more than 3,600 members have signed on or updated their information via the platform and we expect to continue to see growth. Of these 3,600 members, more than 1,300 are expected to be alumni, and 500 of these alumni had been "lost" before signing into the platform. When it is considered that in 2016/17 there were just over 740 alumni donors, myPhiSig lends the potential to engage with these members and increase that base by 65% with new contacts reconnected recently via this platform.

myPhiSig is also a hub for our educational initiatives. GreekLifeEdu is housed and accessed via this portal, as well as many historical documents and educational modules from leadership schools and conclaves. It is a goal that the platform will accommodate a future new member education program and alumni educational programming as well. We are committed to building up the programs and information within the myPhiSig portal, making this is a cornerstone of the Phi Sig experience.

Alpha House

This past year the Grand Council signed off on the transaction that paved the way for the Alpha Chapter Housing Corporation to once again take over the fiduciary and overall management of their chapter house. Through many negotiations, the Fraternity and Alpha arrived at a financial deal that satisfied all parties involved and ensured that a huge part of our history was kept within the Fraternity. As you already know, in 2001 the Fraternity leadership stepped in and intervened in an effort to keep this asset in the hands of Phi Sigma Kappa. Otherwise, like so many other chapter properties, it would have been lost. Since that time, the Grand Chapter, PSK Foundation and PSK Properties have all worked cooperatively to ensure that the asset remains in the hands of Phi Sigma Kappa.

This would not have been possible if it were not for many Alpha Alumni brothers like Bill Rose '77, Frank Puopolo '78, Ed Doherty '74, Matt Young '02, Bryan Cohen '01, and others who stepped up and developed a strong vibrant Alpha Chapter. A special thanks to the Headquarters staff members for their oversight and diligence over the years in working with the Alpha house and chapter. The current Grand Council spent a lot of time dedicated to making sure this was done right and it speaks to their constant dedication to Phi Sigma Kappa. Many thanks also to the many past Grand Presidents who provided great counsel regarding the topic. In particular, the Fraternity needs to recognize Brother Bud Berman who has been instrumental in providing legal counsel as well as skilled negotiations as the representative to the members of the Alpha Chapter Association. Another name that cannot go without mention is Brother Sean Shingler, who led a committee that helped bring the Fraternity to the final stages of negotiation. All in all, this was truly a team effort.



Membership

Over the last five years, our number of associates has increased by 10 percent and the number of initiates has increased by 12 percent. Our retention rate of associates to initiates has increased from 76 percent to 78 percent.

Our average chapter size has increased from 35 men as reported at the 65th General Convention to 44 for this last fiscal year.

Chartered Chapters

Washington State University (Fall 2015)
University of Michigan (Fall 2015)
Indiana University of Pennsylvania (Spring 2016)
Georgia Southern University (Spring 2016)
Long Island University/Post (Fall 2016)
Appalachian State University (Spring 2017)
University of Cincinnati (Spring 2017)

Closed Chapters

Johnson and Wales University
University of Tennessee at Martin

Closed Colonies

Woodbury University
Columbus State University
University of Pennsylvania
Clarion University

Finances - LegFi

The Fraternity is excited to announce a fraternal partnership with Legacy Financial (LegFi) as the preferred provider of billing, accounting, and tax filing services for all chapters and colonies. Please note that the Fraternity is not mandating the use of LegFi. We ask that all chapters and colonies use a third party for the collections of dues, etc. and LegFi is the preferred vendor.

Benefits provided to the chapters by LegFi include:

- creating budgets and tracking cash flow
- Invoicing to members and parents electronically
- Collecting membership agreements
- Quick and easy online bill payments
- Electronic invoices to members and parents
- Phone calls to past due members
- Collections process management when necessary
- Easy, online filing of annual tax reports – forms 990N and 990EZ

Volunteers

The number of chapter advisers is on the rise – 96% of our chapters have full-time chapter advisers. The Grand Chapter continues to reach out to alumni for the remaining chapters. Our goal has always been to have all chapters with a viable chapter adviser. We understand that strong chapters have strong advisers.

Chapters needing a chapter adviser include Lambda at George Washington, Psi Triton at Hobart and Beta Pentaton at East Stroudsburg. We also have chapter advisers seeking replacements for Alpha Deuteron at Illinois, Omega Deuteron at Southern Cal, Gamma Triton at South Carolina, Chi Tetarton at Western Michigan.

With the elimination of the regional counselor position, there are now more regional advisers across the country. The Fraternity has 18 regional advisers covering 59 of our chapters and colonies. We currently have 19 chapters in need of a regional adviser.

A total of 55 of our chapters/colonies have an alumni association, while 35 have a housing corporation affiliated with their chapter.

We created a position on staff dedicated to alumni relations and fundraising. We want to continue to build up our volunteer core and engage more alumni so that we have a strong foundation and resource for our undergraduate brothers.

Risk Management

While we have made a great deal of progress in terms of risk management, we still see some chapters that do not follow our policies and they find themselves facing disciplinary action from the Grand Chapter or their respective schools. By far, our biggest problems surround the misuse of alcohol. We also still see allegations of hazing. It is essential that our undergraduate chapters follow our policies and use the resources that we make available. If you belong to an undergraduate chapter and you are struggling in a particular area, please reach out to our dedicated staff at the International Headquarters. They are there to help. We have seen some significant tragedies face the larger Greek system over the past two years. We need to stay diligent in our education and oversight so that Phi Sigma Kappa continues to practice solid risk management.

Officer Transition

The Grand Chapter has undertaken an effort to revamp our officer transition program to come up with a standardized process that will allow for the Grand Chapter as well as localized chapters to have an elongated and more successful transition period. This will include a five-month training period in which newly elected officers will be able to work alongside those already in office.

The Grand Chapter will set deadlines to report the results of the elections in late November or early December and then have a period in April for installation. This will be monitored and tracked by IHQ staff members and will permit us to present education and leadership programming that will be targeted at the specific positions as they will all be in the same state of transition. This new system will ensure that chapter leadership is knowledgeable about how to lead a chapter before they take office through hands-on learning and experience.

Resolution for the James S. Whitfield Memorial Plaza

Whereas, our dear friend, Brother, advisor and mentor, James S. "Jim" Whitfield was called to eternal peace on Tuesday, December 6, 2016, and;

Whereas, Brother Jim was the epitome of a member of Phi Sigma Kappa in both character and conduct, and;

Whereas, Brother Jim shared freely of his time, talents and treasure with all of Phi Sigma Kappa for more than seventy years, including serving as Foundation Trustee, Grand Council Director (PSK & PSE), Court of Honor member and Grand President (PSE), and;

Whereas, Brother Jim served as one of the two chief architects of the Merger between Phi Sigma Epsilon and Phi Sigma Kappa, the largest and most successful collegiate fraternity merger in history, and;

Whereas, Brother Jim provided significant funding to the flagpole plaza and courtyard at the Phi Sigma Kappa International Headquarters, and;

Whereas, Brother Jim always and in every possible way espoused the virtues of dedication to our Country and reverence to our Flag;

NOW, THEREFORE, BE IT RESOLVED that The Grand Chapter of Phi Sigma Kappa Fraternity formally rededicate and rename the flagpole plaza and courtyard at the Phi Sigma Kappa International Headquarters the James S. Whitfield Memorial Plaza.

BE IT FURTHER RESOLVED that this resolution be spread at length upon the records of Phi Sigma Kappa Fraternity as a memorial of our esteem for our departed Brother, and that a copy of this resolution be presented to members of his family.

The Albert D. Shonk, Jr. Archives and Educational Center

One of the biggest highlights in a number of years was the announcement in 2016 of the Albert D. Shonk Jr. Archive and Educational Center. The Shonk Archive and Educational Center will house our most treasured historically significant pieces. We will transform space at our Headquarters into an engaging/interactive area that will tell our most important stories. In addition to the museum, the center will include a Phi Sig studio where we will deliver online educational programming to our members. We will be able to ensure our history and stories remains in perpetuity while at the same time offering online education to our members. This is a project the whole fraternity can rally behind and take pride in. Building our Archives is Chris Pennington of Penwal Industries. Penwal has done amazing projects all over the world for clients like Disney, Nike, LA Clippers, Emirates Airlines, USC, etc. On Saturday of our 66th General Convention, we will be inducting Chris as a brother of Phi Sigma Kappa!

In conjunction with convention, we will be launching our public fundraising effort to raise funds so that this project becomes a reality. We plan on groundbreaking in winter and unveiling our Archive and Educational Center on Founders day March 15, 2018. We are asking that all our brothers support this extraordinary effort in some way. Please donate and support this central endeavor!

Fraternally and Respectfully Submitted,

Scott Jacobson '01
Grand President

Kathy Cannady
Acting Chief Operating Officer
Phi Sigma Kappa Fraternity

