



PHI ALPHA HONOR SOCIETY
for Social Work

CHAPTER HANDBOOK

Phi Alpha Honor Society
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I. OVERVIEW

A. A Brief History

The concept of a national social work honor society came from a group of undergraduate social work students at Michigan State University in 1960. Investigation revealed that local chapters existed at three schools. Those three schools along with a few other schools formed a National Honor Society Committee in November of 1960. For more than a year, this committee worked on the constitution and other administrative matters. The name Phi Alpha was adopted from the local chapter existing at Florida State University.

The constitution and formal organization were completed in 1962, and six chapters qualified to become “charter chapters.” The charter chapters were Florida State University, Michigan State University, Ohio North University, Central State College, University of Dayton, and the University of Tennessee. Over 450 chapters are now in existence, and the Society continues to grow.

Phi Alpha offers membership to social work students, faculty, and practitioners. Each chapter may develop a program to meet local needs; however, the Phi Alpha Bylaws control if there is a dispute or discrepancy regarding any provision of the chapter’s bylaws and/or any rule imposed. Phi Alpha was incorporated in the State of Tennessee, where its principal executive office is located, on April 11, 2018. Phi Alpha became a member of the Association of College Honor Societies (ACHS) on February 14, 2019. The Phi Alpha International Business Meeting is held during the Council on Social Work Education’s (“CSWE’s”) Annual Program Meeting. Each chapter has one voting representative as a member of the International Council.

B. Mission

The purpose of Phi Alpha Honor Society is to provide a closer bond among students of social work and promote humanitarian goals and ideas. Phi Alpha fosters high standards of education for social workers and invites into membership those who have attained excellence in scholarship and achievement in social work.

C. Purposes and Objectives

- To recognize and promote scholastic achievement in undergraduate and graduate social work programs accredited by the Council on Social Work Education (“CSWE”.)
- To improve and further the goals and objectives of social work in the community, state, nation and world by:
 - Encouraging objectivity and awareness of current developments and practices in the various fields of social work;
 - Developing active communication and positive working relations among schools of social work, undergraduate programs, professional social workers, and the general public;
 - Stimulating interest in preparation for a career in social work; and
 - Furthering research and study in social work.
- To recognize those professional social workers whose service and leadership are held in esteem.
- To provide scholarships for certain students to further their studies in the field of social work.
- To cooperate with other organizations and groups that have similar goals and ideals.

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II. BENEFITS OF MEMBERSHIP

- Promotes humanitarian goals and ideas
- Provides grants, awards, and scholarships
- Recognition of academic excellence
- Social Work's internationally recognized honor society
- Social Work's largest honor society
- Students have met high standards
- Respected by employers, social workers, and college admissions
- National presentation opportunities
- Lifetime membership
- Membership certificate and lapel pin
- Membership card

Promotes Bonds Among Students

- Induction ceremony
- Local chapter meetings
- Leadership opportunities

Promotes Humanitarian Goals & Ideals

- Community service projects
- Volunteer opportunities
- Alumni participation
- Mentoring

Provides Grants, Awards, & Scholarships

- Student membership support
- Chapter support
- Chapter grants
- Chapter service awards
- Poster Presentation Competition
- Student leadership Award
- Patty Gibbs-Wahlberg Scholarship
- MSW Scholarship
- Advisor of the Year Award

A. AWARDS and SCHOLARSHIPS

Each scholarship each award gets judged by three different judges to make it fair.

1. Student Membership Support Grant

The Student Membership Support Grant is designed for any student eligible for Phi Alpha membership whose situation makes it a challenge to pay international membership fees. Each chapter may receive two memberships per academic year at no cost to it if such grant request is timely submitted by the chapter. Such members are only then responsible for chapter fees, if any. Requests for the Student Membership Support Grant are due when the certificates for such members are ordered.

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2. Chapter Support Grant

The Chapter Support Grant offers support to chapters in organizing membership and new chapter recruitment. Chapters may submit a grant request to receive up to \$100.00 toward an event or meeting. This grant is often used if Chapters are asked to organize membership informational meeting and invite students who are potentially eligible to join Phi Alpha. Funds may be used for refreshments, materials or other items. Chapters may also receive a Phi Alpha tabletop display. Chapters are to submit a brief account following the event as a follow-up to their receipt of grant funds, and such grant can be requested at any time needed.

3. Chapter Grants

Chapter Grants are available to promote and support chapters' engagement in service learning. The program supports activities consistent with the mission of promoting humanitarian goals and bonds among students. Chapters who submit a grant request which is granted by Phi Alpha are funded up to \$1,000.00 to conduct service projects in their communities. A maximum of \$6,000.00 is awarded each academic year to various requesting Chapters. Chapters must submit a brief account following the service project as a follow-up to their receipt of grant funds. Chapters must submit the grant requests by September 1st and January 1st of each year for such request to be considered.

4. Chapter Service Award

The Chapter Service Award recognizes outstanding service conducted by a Chapter. Four \$500.00 awards are presented per year. As part of the award, Phi Alpha reimburses up to \$1,000.00 per chapter in travel expenses to participate in the poster presentation session at the Phi Alpha International Business Meeting at the Council on Social Work Education Annual Program Meeting. The deadline for nominations for the Chapter Service Award is May 31st of each year.

5. Chapter Service Poster Presentation

The Chapter Service Award winners are invited to present at the Phi Alpha International Business Meeting held at the Council on Social Work Education Annual Program Meeting. At least one other chapter will be selected for presentation from those who submit a poster presentation abstract, for a total of five Chapters presenting. Presenting schools will be awarded \$500.00 each for presenting and will be reimbursed up to \$1000.00 for travel. This is in addition to the Chapter Service Award. The deadline for submission of this award is October 1st of each year.

6. Student Leadership Award

The Student Leadership Award recognizes outstanding student leadership consistent with the ideals and mission of Phi Alpha. The focus of the application is the student's leadership, service, impact, and commitment. The cash awards are \$1,000.00, \$750.00, and \$500.00. The first place selection will receive an all-expenses-paid trip to receive her or his award at the Phi Alpha International Business Meeting held at the Council on Social Work Education Annual Program Meeting. Students are nominated by their Phi Alpha Chapter Advisor. Students must be active leaders of Phi Alpha to be nominated, and such nominations are due by May 31st of each year.

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7. Patty Gibbs-Wahlberg Scholarship Award

The Patty Gibbs-Wahlberg Scholarship Award recognizes undergraduate student scholarship, service and leadership. The cash awards of \$3,000.00, \$2,000.00, and \$1,000.00 are presented each year. The first place winner receives an all-expenses-paid trip to present her or his application and supporting social work evidence during the Student Session of the Association of Baccalaureate Program Directors Conference. This award is open to only undergraduate Phi Alpha chapter members, and applications are due by May 31st of each year.

8. MSW Scholarship Award

The MSW Scholarship Award recognizes graduate student scholarship, service and leadership. The cash awards of \$3,000.00, \$2,000.00 and \$1,000.00 are presented each year. The first place winner receives an all-expense-paid trip to present her or his application and supporting social work evidence during the Phi Alpha Executive meeting in conjunction with the Council in Social Work each fall. This award is open to only graduate Phi Alpha chapter members, and applications are due by May 31st of each year.

9. Advisor of the Year

The Advisor of the Year recognizes outstanding service by advisors to chapters. Advisors are nominated by their students and one winner is selected. The nominations for Advisor of the Year are due by May 31st of each year. A plaque is awarded and Phi Alpha reimburses all travel expenses to receive the award at the Phi Alpha International Business Meeting held at the Council on Social Work Education Annual Program Meeting.

Chapters and/or students may apply for any award for which they are eligible. All applications and nominations will be considered on a case by case basis and must have separate complete applications and/or nominations for each award even if a Chapter or a student is being considered for multiple awards.

Please note that deadlines may be altered by Phi Alpha at any time so Chapters, Advisors, and students should review the Programs section of the Phi Alpha Honor Society website:
<https://phialpha.org/programs.html>

III. MEMBERSHIP

Members shall meet the following minimum criteria for membership. Any chapter, at its discretion, may establish higher or additional criteria, but below is the minimum criteria. Any individual applying for membership shall complete any application procedure required. Any controversy concerning membership approval, categories, or criteria will be resolved by the Society Board of Directors, which has final authority and sole and absolute discretion in this regard.

A. Members

Each chapter may have the following types of Membership:

(a) Active Members.

Members who have paid the one-time international dues and meet the qualifications for an active member classification shall be active members of Phi Alpha. Advisor Members shall also be active members of Phi Alpha, even though an Advisor Member may not have paid the international dues, since Advisor Member's international dues are waived as hereinafter provided under (v) hereinafter.

(i) Collegiate Members.

Collegiate members shall be students enrolled in undergraduate, graduate or doctoral programs at the time of induction and have been recommended for membership by their local chapter and who have paid dues.

a) Undergraduate Students.

Undergraduate students shall be enrolled in the institution represented by the chapter, have declared a major in social work, have completed 9 semester hours of required social work courses and rank in the top 35% of their class.

b) Graduate Students

Graduate students shall be enrolled in a graduate program in social work, have completed one term of course work with 9 semester hours of required social work courses, and rank in the top 35% of their class.

c) Doctoral Students

Doctoral students shall require a masters in social work, be enrolled in a doctoral program in social work, have completed one term of course work with 9 semester hours of required social work courses and, rank in the top 35% of their class.

d) Invitational Only

Collegiate Members are admitted upon meeting criteria and by invitation only from the local collegiate chapter at the college or university where the Collegiate Member attends school at time of membership.

e) Requalification

If any other classification of Member (listed herein below) qualifies to become a Collegiate Member, then such Alumni, Professional or Faculty Member shall request that the local collegiate chapter admit said Member as a Collegiate Member, which would enable such Member to serve as a collegiate officer. Notwithstanding the

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above, any Member who desires to become a Collegiate Member must not also be a tenured professor in social work at the college at which said Member is seeking collegiate membership, even if such individual is also a student. This prohibition shall not apply to student teachers/aids or to adjunct faculty.

(ii) Alumni Members.

Alumni Members shall be a lifetime member who wishes to remain engaged. Alumni Members shall be affiliated with a collegiate chapter. Any Alumni Member must have been a Collegiate Member and automatically becomes an Alumni Member upon graduation or transfer to a college or university without an active collegiate chapter as long as he/she was a Collegiate Member in good standing at the time of such graduation or transfer.

(iii) Professional Members.

Professional Members who met their collegiate chapter's criteria, but did not apply for membership while in college, or meet the current collegiate chapter's criteria if such chapter was not active or institute during their attendance at said college, may apply for membership through their alma mater's active collegiate chapter. Professional Members must have graduated from said school with a degree in social work and be employed in a position for which said degree is required or highly desirable to apply for membership.

(iv) Faculty Members.

Faculty Members shall be a member of the faculty or has a professional designation (e.g., Director of Field Instruction) within the university or college which has a collegiate chapter. Faculty Members apply for membership through said college's chapter. Faculty Members must be employed full-time by said college or university and have at least a Master's Degree in social work. If a faculty member intends to become a Phi Alpha Member for the purpose of serving as a chapter advisor, they qualify as an Advisor Member as long as said faculty member is on the faculty of the college or university to which collegiate chapter he or she plans to advise.

(v) Advisor Members.

Advisor Members shall be the advisor of a collegiate chapter at the time of membership and shall meet the requirements of at least one of the other categories of active membership listed hereinbefore. While a Member is serving as an advisor, that Member is an Advisor Member and must remain so during the entire time said Member serves as an advisor. Advisor Members are not required to pay the international dues, but may be required to pay any local chapter dues in the chapter to which they are an advisor other than international dues that such local chapter assesses to each active Member. If an Advisor Member is no longer an advisor, then such membership shall convert to the membership type under which Advisor Member qualified at such time of membership, but no assessment of international dues shall be assessed upon such Advisor Member's conversion to other active membership.

(b) Honorary Members.

Honorary Members shall be persons, other than students, outside Phi Alpha who have provided distinctive contributions to the field of social work and are granted only by the sole permission of Phi Alpha. Chapters must submit a request to Phi Alpha to bestow such Honorary Membership and provide details of why such applicant meets the qualifications for Honorary Member status. These memberships are honorary and do not have voting rights. Honorary Members are almost always bestowed by local collegiate chapters, but Phi Alpha shall also have the right, but not the obligation,

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to bestow such Honorary Member membership since such membership does not contain the right to vote and will assign such Honorary Member a local chapter for affiliation.

B. Payment of Dues

Each active Member other than Advisor (Collegiate, Alumni, Professional, or Faculty) is required to have submitted the international dues to Phi Alpha through the local chapter to which they are affiliated prior to being declared a Member of Phi Alpha or having any privileges of such membership. Advisor Members' international dues are waived, but if such Advisor Member has already paid the international dues prior to becoming an Advisor Member, then no refund will be issued. Each local chapter determines the amount of local dues, if any, that each membership class shall pay to said local chapter. Since Honorary Members do not vote and their membership is honorary, there are no dues assessed to Honorary Members. If an Honorary Member desires to become an active member, said Honorary Member must (i) declare their intent to qualify for active membership and the type of membership requested to their local collegiate chapter, (ii) meet the qualifications for the requested type of active membership, and (iii) pay the appropriate international and local dues for such membership in the same manner as any other person apply for active membership of that particular membership classification.

C. Non-Discrimination

Membership in Phi Alpha is open to qualified candidates, including persons with disability, without regard to age, color, gender, gender identity, gender expression, national origin, race, religion, and/or sexual orientation.

D. Payment of Dues to Society

Each local chapter is required to submit international dues for any new member to Phi Alpha prior to any rights or benefits of membership being given to such Member. Membership is not conferred upon any active Members prior to a notice of approved membership (which notice shall include the individual's full name, membership classification, and confirmation of each qualification required for said membership classification, including additional local chapter qualification requirements) and the international dues being submitted by the local chapter and received by Phi Alpha.

E. Privileges of Membership

Active members shall have the right to vote, hold office in Phi Alpha and the local chapter (though only Collegiate Members may be officers in any collegiate chapter), be elected or appointed to committees of Phi Alpha provided other uniform criteria are met, and have such other privileges as the Phi Alpha Board of Directors and the local chapter shall determine. Collegiate Members may also be elected or appointed to committees of the chapters to which the members belong provided other uniform criteria are met, with other Active Members being able to serve as non-voting members of said committees. Honorary Members shall have all the privileges of Active Members except the right to vote, hold office, or serve on committees.

IV. COLLEGIATE OFFICERS AND ADVISORS

Required Collegiate Officers

The officers of each chapter shall consist of a President, a Vice-President, a Secretary, and a Treasurer (or a combined Secretary-Treasurer position), which shall be Collegiate Members (whether undergraduate, graduate or doctoral students).

Additional Officers

Additional officers may be added to meet the needs of the individual chapters.

Qualifications

The officers of the chapter must be current active members who have maintained the scholarship requirements for induction. The officers of a collegiate chapter must be Collegiate Members.

Mentors

The chapter may have Alumni, Professional, Faculty, or Honorary Members who serve as mentors for the chapter. The Mentor role is advisory only. All chapter business must be conducted by the officers.

Faculty Advisor

Each chapter is required to have an advisor who is a member of the faculty or has a professional designation (e.g., Director of Field Instruction) within the university. This Advisor should be affiliated with the department that oversees a social work program at that university or college and must be an Advisor Member of Phi Alpha.

A. OFFICER RESPONSIBILITIES

Each student organization writes its own constitution or bylaws (hereinafter referred to as “bylaws”), which should outline the basic role of each organization officer. It is solely up to the members of the organization to assign responsibilities to a specific officer. The following are some possible officer position responsibilities. A bylaws template is attached hereto for your direction and convenience. It is intended to assist you in bylaws development and to help you answer the question, *“Now I’ve been elected, what am I supposed to do?”* Although a student organization's bylaws list some specific positions' responsibilities, each officer should have the freedom to personalize his/her office with chapter approval. However, a good officer never forgets what the basic responsibilities are. Attached are suggested and required guidelines for officer duties and obligations, which are also contained in the bylaws template attached to this Handbook.

1. PRESIDENT/VICE PRESIDENT

As chapter president or vice president, you oversee the chapter’s operations. The vice-president is required to step into the president’s role in the absence of the president.

Chapter Officer Transition: Tips for Transitioning Between Outgoing and Incoming Officers:

- https://www.geneseo.edu/student_life/how-transition-officers-virtually
- <https://www.eastfalls.jefferson.edu/studentengagement/inc/documents/ClubsOrgsForms/OSE-Leader-Transition-Checklist.pdf>
- <https://www.csudh.edu/Assets/csudh-sites/student-life/docs/officer-transition-guide.pdf>

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Chapter Officer Training: How to Run an Effective Meeting
<https://www.youtube.com/watch?v=W8FMPxh40Kw>

Suggested responsibilities to your chapter

- Working with your advisor and other officers, develop a written plan of action for the chapter's activities for the year, including at least one activity that promotes scholarship, community service, and leadership development.
- Call chapter meetings and establish a meeting schedule.
- Preside fairly at chapter meetings.
- Be respectful of time, while still encouraging everyone to fully participate.
- Facilitate chapter goal-setting.
- Meet with other officers regularly.
- Update administrators on chapter activities.
- Have members complete the Liability Waiver for each event
https://secureservercdn.net/198.71.233.39/d9v.0de.myftpupload.com/wp-content/uploads/2020/03/LIABILITY_WAIVER.pdf
- Offer chapter assistance to the college/university.
- Be familiar with chapter and International Bylaws and policies.
- Preside over the induction ceremony.
- Ensure transition and orientation of new officers.
- Ensure your chapter is registered with your school's student affairs/student organizations office.
- Use effective event planning <https://www.etsu.edu/students/sao/documents/event-planning-checklist-for-student-organizations.pdf>
- Learn about, promote, and apply for Phi Alpha service awards and/or grants
<https://phialpha.org/programs/>

National/International responsibilities

- Ensure that your chapter has all required collegiate officers.
- Submit the Chapter Year-End Report to the Home Office on or before May 31st
<https://www.phialpha.org/>
- Ensure that the International Office has your most current Bylaws.

Tips for setting the tone for your chapter

It's ultimately up to you to see that the chapter functions, is productive and benefits both the members and the campus. Sometimes problems can be solved before they occur through the setting of a positive tone for the chapter.

- Be organized for each meeting.
- Regularly attend meetings, functions, and activities.
- Set specific goals that are measurable and attainable.
- Encourage and find ways to get all members involved.
- Fulfill commitments you make to a member or the group.
- Set aside time for the members to be social.
- Set and stick to a budget (created with the treasurer and approved by the chapter).
- Work to stay positive.
- Delegate.

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Above all, as a chapter leader, remember there is a limit to your ability and time commitments. You cannot do it all. After time, you will realize that while you can provide leadership, you must not do all the work for the chapter. Provide a conscientious example, fulfill your obligations and responsibilities to the chapter, and then work to help other members succeed. Remember, people help support what they help create. By helping each member to improve and learn, you have succeeded as a student, a chapter leader and a Phi Alpha member.

2. SECRETARY

As secretary of your Phi Alpha chapter, you will serve on your chapter's executive board (note: the Secretary position may be combined with the Treasurer position).

Suggested responsibilities to your chapter

- Keep all Minutes, correspondence and paperwork.
- Record Minutes of each meeting and distribute copies.
- Keep accurate roll of members' attendance at all functions.
- Notify members of place and time of meetings.
- Notify new members of their selection after approval.
- Notify new members of their orientation date and time.
- Orient and turn over all materials to your successor.
- Distribute/file minutes for all members and the advisor. Distribute through campus mail or email and file electronically such that all members may access them virtually.
- Contribute, as needed, to the Chapter Year-End Report.

Tips for taking Minutes

Here are tips on what should be included in meeting Minutes:

- Type of meeting.
- Name of the organization.
- Date, time and place of the meeting.
- Names of all members in attendance.
- The fact that a quorum was present.
- The fact that previous Minutes were read and approved.
- Details on reports were presented and any action taken.
- Name of the mover of motions and exact text of motions.
- The disposition of each main motion.
- Notices of motions to be introduced at future meetings.
- Points of order and any rulings that set precedents.
- All counted votes should be recorded.
- The time of adjournment.
- Information about your next meeting (including date, time and location).

3. TREASURER

As treasurer of your Phi Alpha chapter, you will serve on your chapter's executive board and give monthly attention to the details of bookkeeping and money management. (note: the Treasurer position may be combined with the Secretary position).

It is recommended that a budget be prepared, fundraising be successfully accomplished and funds disbursed with accuracy and timeliness. (note: the Treasurer position may be combined with the Secretary position). Consider developing a budget using an online template:

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<https://helloendless.com/how-to-create-your-event-budget/>

<https://templates.office.com/en-us/Academic-club-budget-TM00000001>

https://www.southeastern.edu/admin/stu_orgs/assets/budgeting_for_your_s.pdf

<https://www.template.net/business/budget-templates/student-budget/>

Suggested responsibilities to your chapter

- Serve as a co-signatory along with Advisor on chapter bank accounts.
- Oversee or serve on fundraising committee.
- Establish a chapter budget.
- Hold at least one fundraising event.
- Provide regular financial reports or updates to chapter.
- Collect new and continuing membership fees.
- Execute end-of-year audit of chapter financial records.
- Orient and turn over all materials to your successor.
- Contribute, as needed, to the Chapter Year-End Report.

Tips for managing your books

At the beginning of your term, the executive council (President, Vice-President, Secretary, Treasurer and Advisor) should review your chapter's bank statements, prior budgets and previous Chapter Finance Reports. Make sure you have forms for transactions like reimbursements and receipts. The Treasurer and the chapter Advisor should be signatories on your chapter's accounts. Always keep the chapter finances and the checkbook balanced. Remember that your chapter's spending must benefit the organization as a whole and not any individual member.

Minding our 501(c)(3)s

Phi Alpha Honor Society is considered a charitable educational organization by virtue of its classification as a tax-exempt organization under section 501(c)(3) of the Internal Revenue Code. However, this classification does not extend to individual chapters. Please consult your school's student affairs/student organizations office for information regarding the extension of tax-free status to your chapter. Do not represent to any party that donations made to the chapter are eligible for a charitable contribution for tax purposes. Please note that any unrestricted funds raised by the chapter for Phi Alpha Honor Society may be sent to the International Office and a contribution letter may be issued by Phi Alpha for any such donated funds.

4. TIPS FOR NOMINATION AND ELECTION PROCESS FOR OFFICERS

- Email all members to let them know what positions are available and hold elections in the quarter/semester before the outgoing Leaders will leave so that incoming officers can shadow
- Allow student to nominate themselves. Ask them to write a little bio of why they want to be in that particular position.
- On the member application, ask student members to indicate their interest in serving in a leadership role.
- Encourage officers to start meeting and planning during the summer.
- Consider students who were members as BSWs: as an MSW they are good officer candidates because they have some institutional knowledge.

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5. ADVISOR

Phi Alpha advisors should expect to play a very active role in Chapter activities. Students often have only one or two years after being inducted and the quick turnover of active students and officers necessitates strong advisor leadership. Advisors should be both accessible and interested and should provide whatever counsel a group or its members might seek.

As an Advisor you will assume numerous roles. A key idea to remember is that you are an advisor, not the leader. You provide guidance, insight, and perspective to students as they work on projects, but you should not be doing the work. Students will learn if they are engaged. Be careful of being challenged into doing the work for a student project. The students make the decisions, and they are accountable for those decisions, and for the successes and failures of their groups.

As an Advisor, you will be working with the best and brightest. You will help channel the energy and creativity of these talented students to benefit your campus and community. Under your guidance, the chapter will be able to fulfill the high expectations of Phi Alpha. Ultimately, you will help these bright members develop even stronger leadership skills and will help your chapter promote Phi Alpha's ideals of scholarship, leadership and service. Collegiate Phi Alpha members are able, competent and imaginative. However, they bring no previous Phi Alpha experience to their chapters. Advisors bring great individual contributions to the group and, if alums, are quite familiar with how Phi Alpha functions.

Active interest and participation by the advisors in the group functioning is necessary and desired by the chapters. The Advisor's experience, knowledge of the institution and the community and commitment to education are the qualities brought to the group. These qualities are indispensable to whatever programs the chapters may decide to undertake. Each chapter is unique. Understanding and fostering this uniqueness is an important role of the Chapter Advisor. Advisors are encouraged to meet with the chapter as a whole and chapter officers as regularly as possible so they may become acquainted with the members and be familiar with the chapter's goals in order to give helpful ideas. Advisors are not, of course, expected to direct the chapter's program or work, but the strongest Phi Alpha chapters are invariably those whose advisors are genuinely interested and who are sufficiently close to the group to give suggestions and advice.

The best way to assure a successful chapter is to spend time and energy on a good orientation process. If the candidates are fully informed of Phi Alpha's goals and purposes before active commitment, they will be better prepared to fulfill those obligations. While a great deal of emphasis is placed on a thorough orientation for the new members, it is critical to have the retiring chapter officers fully orient their successors. The advisor's responsibility is to cooperate in the planning of this officer transition.

Often these advisor-student relationships become some of the most meaningful experiences of the members and advisors. Chapters may nominate an outstanding advisor for the Advisor of the Year Award each spring.

Chapter Responsibilities

- Assist your student officer to develop a written plan of action for the chapter's activities for the upcoming year, including at least one activity that promotes scholarship, community service, and leadership development.
- Attend executive board and chapter meetings.
- Attend all new member selection meetings.
- Assist in a thorough orientation for new members.
- Encourage use of parliamentary procedure.

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- Assist in chapter programming.
- Review the chapter budget.
- Serve as a co-signatory on chapter bank accounts.
- Communicate campus policies and procedures.
- Serve as a sounding board for chapter officers.
- Aid in preserving the continuity of the chapter.
- Be generally available to assist the organization.
- Aid chapters in identifying future advisors.
- Aid in registering the chapter as a student organization.
- Remind the chapter of deadlines for reports.
- Assist the chapter in finding funding sources.
- Encourage the use of campus and national resources.
- Learn about, promote, and apply for Phi Alpha service awards and/or grants
<https://www.phialpha.org/programs.html>
- Oversee the induction of new members (see Induction Checklist et al. for details)
- Ensure that the Chapter Self-Assessment is completed.

National/International Responsibilities

Your Phi Alpha chapter likely has rich traditions of its own. At the same time, each chapter is a member of a large, international organization. We can learn so much from each other. In order for us to continue to grow and improve as an honor society, we need your help. There are several ways you can help ensure that your chapter maintains its international connections:

- Maintain contact with the International Office.
- Let your students know about the national conference and encourage attendance.
- Keep current with Phi Alpha news and share with your members.
- Ensure that the Chapter Year-End Report is filed on or before May 31.
- Ensure that the International Office has a current list of officers.
- Ensure that the International Office has a current version of chapter bylaws.

6. TIPS FOR PROMOTING COLLABORATION WITH OTHER ASSOCIATIONS

- Have officers of all social work student associations meet with Phi Alpha officers. This allows all groups to converse about who's doing what re: goals/projects.
- Collaboration also addresses officer overlap between associations (ie, the president in one group may be then the secretary in another, etc.). Students can collaborate more easily on the projects and the work that they are going to do.

V. RECRUITMENT & INDUCTIONS

The following material outlines preparations for identifying and initiating new members. This information should be very helpful to advisors and officers, who may adapt it for their own chapter.

Although the induction ceremony is not mandatory, it is highly encouraged as formal recognition and celebration by faculty, family, and friends for academic excellence and distinguished honor. Plan induction ceremonies to be as dignified and effective as possible. Rituals are provided by the international office

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and are expected to be followed. Variations in the ceremony are acceptable as long as the total effect is dignified and impressive.

New members who are unable to be initiated with the class may be initiated by the chapter officers in the presence of the chapter advisor. Every effort should be made to initiate all new members. Should all efforts prove unsuccessful, certificates and regalia should be mailed to them.

A. Identify eligible students

- Undergraduate and graduate students are eligible for active membership after achieving the following International minimum requirements (coursework and Top 35%) and meeting local Chapter requirements (if applicable):
- Coursework. Students need to have completed 9 credit-hours in Social Work, plus must have completed at least 37.5% of the required coursework toward the degree. (In undergraduate programs, having to complete 37.5% of the required coursework essentially means the student will be at least a second-semester sophomore. In graduate programs, it will depend upon the length of program.)
- Top 35% GPA
 - Background. Phi Alpha Honor Society is a certified member of the Association of College Honor Societies (ACHS) www.achshonor.org/. Certification by ACHS requires adherence to strict guidelines for organizational excellence, transparency, participatory governance, and scholastic eligibility. Certification by ACHS ensures to students, employers, graduate programs, and the public that members have distinguished themselves among their peers by being the top performers in their program.
 - Certification separates Phi Alpha from many other honor societies students are invited to join. Certification by ACHS requires that honor societies use the top 35% criteria. Their position is with the set GPA method, a program could have every student eligible for membership. This would be more of a recognition organization than an honor society. The major honor societies in Psychology, Sociology, Criminal Justice, Nursing, and many other disciplines are members of ACHS and use the top 35% criteria.
 - The pool to draw the 35% from is all students in the social work program.

Steps to identify top 35% - (make sure to follow all school and privacy requirements for accessing this information)
<ol style="list-style-type: none"> 1. Pull enrollment by major report from university system 2. Select all Social Work majors 3. Rank students from highest to lowest by overall GPA 4. Count number of students on the report 5. Calculate number of students x .35 <p>This sum represents the ranked number of the student on the report whose GPA is used to separate the GPA of the top 35% of majors from the lower 65% of majors.</p>
<p>Example #1</p> <p>n = 100 majors in your program x .35 = 35</p> <p>->the GPA of the 35th ranked student is the GPA cutoff for your program at that time</p>
<p>Example #2</p> <p>n = 232 majors in your program x .35 = 81</p> <p>-> the GPA of the 81st ranked student is the cutoff for your program at that time</p>

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B. Develop timeline

1. In-person Inductions

- Select date, time, and location of induction; schedule with appropriate office on campus. Make sure the facility has enough room for expected family and friend of inductees, as well as for the membership of the Chapter.
- Plan method for getting information about Phi Alpha to prospective members (i.e information session, e-mail, social media, etc.) Suggestion: request the **Chapter Support grant (up to \$100)** for your invitation/information session. Funds may be used for refreshments, materials, or other items. Chapters will also receive a Phi Alpha tabletop display. All active chapters are eligible for this grant. Your Chapter is asked to submit a brief account following the event or meeting. (Note: this grant is for recruitment purposes only and is discretionarily awarded.)
- Determine method and deadline for receiving membership dues from prospective members. Reminder: the International Office provides a **Student Membership Support** grant program designed for students eligible for Phi Alpha membership whose situation makes it a challenge to pay membership fees. **Each chapter may receive 2 international memberships per academic year at no cost.** Chapters are responsible for any chapter fees. (Note: this grant is discretionarily awarded and is based on need of the student, not the Chapter.)
- Decide whether or not to hold a reception or banquet following the induction ceremony, and plan accordingly.

2. Online Inductions

- Select date, time, and video conferencing platform for induction. Make sure the platform has enough capacity for expected family and friend of inductees, as well as for the membership of the Chapter.
- Plan method for getting information about Phi Alpha to prospective members (i.e information session, e-mail, social media, etc.). Suggestion: request the **Chapter Support grant (up to \$100)** for your invitation/information session. Funds may be used for raffles, etc.. All active chapters are eligible for this grant. Your Chapter is asked to submit a brief account following the event or meeting. (Note: this grant is for recruitment purposes only and is discretionarily awarded.)
- Determine method and deadline for receiving membership dues from prospective members. Reminder: the International Office provides a **Student Membership Support** grant program designed for students eligible for Phi Alpha membership whose situation makes it a challenge to pay membership fees. **Each chapter may receive 2 international memberships per academic year at no cost.** Chapters are responsible for any chapter fees. (Note: this grant is discretionarily awarded and is based on need of the student, not the Chapter.)

C. Recruitment Content

Consider the following for the letter of invitation to join and/or for an information session agenda:

- Qualifications for membership.
- Offer of membership.
- Descriptive information about Phi Alpha.
- Activities and programs of Phi Alpha.

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- Costs involved (i.e., membership dues - required international fee and chapter fee (Chapter fee is optional)).
- Date, time, and place of information session, if planned.
- Date, time, and location (in-person or online) of induction ceremony.
- <https://www.phialpha.org/assets/phi-alpha-logo-color.jpg>
- RSVP instructions, including number of guests expected, if in-person.

D. Select and Invite Honorary Members (optional)

- Provide them a description of Phi Alpha programs, activities, and purposes.
- Inform them of planned induction ceremony date, time, and place.
- Request indication of their interest in becoming honorary members.
- Verify that they meet the requirements of Phi Alpha for honorary membership and approval of Phi Alpha.

E. Information/Recruitment Meeting (optional)

- General information about Phi Alpha (history, purpose).
- Description of programs and activities of Phi Alpha.
- Possible activities for new members of Phi Alpha.
- Deadline for prospective members to decide to become members.
- Date, time, and location of next meeting for prospective members (i.e., induction ceremony, other activity).
- Distribute applications for officer positions and explain selection process.

F. Submit New Member Application/Fees and Order Merchandise

- Collect all applications/fees.
- Download and complete the Certificate Order Form Request.
- <https://www.phialpha.org/order-certificates.html>
- Submit one (1) check or money order for all inductees.
- Order merchandise, if desired (See CERTIFICATES, LAPEL PINS, MEMBERSHIP CARDS, AND MERCHANDISE or go to <https://phialpha.org/order-merchandise/>

G. Induction Ceremony Logistics/Preparation

1. In-person Ceremony

- Confirm space reservation with appropriate person
- Identify and invite keynote speaker (note that this person may become an Honorary Member if requirements are met.)
- Plan ceremony program.
- Send invitations to induction ceremony (if desired) to appropriate persons (i.e., parents and family of initiates, faculty and administrators, etc.)
- Send reminder to inductees (regular and honorary) of date, time location, and special instructions for induction ceremony

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- Purchase supplies needed (i.e., candles)
- Plan reception following ceremony, if desired
- Determine order for officers and initiates to enter ceremony room
- Prepare entry order list and make 3-4 copies, one for each person who will:
 - Line up initiates
 - Read names of initiates during ceremony
 - Distribute certificates/lapel pins/membership cards
 - Distribute medals, stoles, or cords (if desired)
- Prepare citations for honorary members
- Review induction ceremony with officers and determine responsibilities for each person
- Prepare cue cards for ceremony, if needed
- Practice ceremony
- Assemble all necessary materials for ceremony (i.e. program, insignia cloth, candles, matches, signature sheets, pens, citations for honorary initiates, certificates, and regalia)
- <https://www.phialpha.org/assets/phi-alpha-logo-color.jpg>
- Arrange materials appropriately on induction table(s).
- Distribute cue cards to appropriate officers.
- Assemble initiates and line up according to entry order list.
- Escort guests to induction ceremony room.

2. Online Ceremony

- Set up videoconferencing call (meeting ID and, if desired, password)
- Identify and invite keynote speaker (note that this person may become an Honorary Member if requirements are met.)
- Plan ceremony program. Consider:
 - Music while attendees are joining the meeting.
 - Master of ceremonies.
 - Special guests, speakers
 - Prepare citations for honorary members
 - Welcome video from Paul Baggett, Executive Director of Phi Alpha
 - Presentation of inductees (options: PPT with inductee's photos/name).
 - Review induction ceremony with officers and determine responsibilities for each person. Consider gif flickering candle on PPT slide (<https://giphy.com/explore/flickering-candle>)
 - Ask each student to bring a candle to the screen.
 - Consider having each student type "I do" into the chat in addition to raising their hands.
 - Plans for distributing certificates/lapel pins/membership cards
 - Plans for distributing medals, stoles, or cords (if desired)
- Send invitations to induction ceremony (if desired) to appropriate persons (i.e., parents and family of initiates, faculty and administrators, etc.)
- Send reminder to inductees (regular and honorary) of date, time, meeting ID/password, and special instructions for induction ceremony
- Practice ceremony with IT

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H. Recruitment and Induction Tips

1. Recruitment

- Maximize the potential that those who are eligible are invited and join. Consider ways to reach out to students to promote your chapters.
- Consider recruiting at orientation or in class by having Phi Alpha leaders to talk about Phi Alpha and what it is and build interest among the students.
- Recruit and induct every quarter/semester.
- For virtual recruitment meetings, use some of the Chapter Service Program money to do a raffle.
- Talk about the top 35% eligibility requirement as aspirational, an honor that is earned by hard work.
- Promote via Facebook or other social media.
- Consider creating a recruitment video rather than just a narrative.
- Ask senior students who are Phi Alpha officers to go to classes and talk about Phi Alpha.
- Organize a meeting/mixer and invite your top 35% to learn about Phi Alpha.
- Use the Chapter Service Program that supports chapters in organizing new recruitment. *Chapters may ask to receive up to \$100.00 towards an event or meeting. Chapters are asked to organize membership and invite students who are eligible to join Phi Alpha. Funds may be used for refreshments, materials or other items. Chapters will also receive a Phi Alpha Tabletop Display. Chapters should submit a brief account following the event or meeting. Please contact the Phi Alpha Home Office at phialphainfo@etsu*
- Invite students to join as soon as they are eligible. Most undergraduate social work majors have the required 37.5% of coursework toward the degree and 9 credit hours in Social Work after their sophomore year. Advanced standing graduate students may be eligible after one semester. Inviting students as soon as they are eligible increases the number of students in the chapter, providing a larger pool of potential officers and service-learning volunteers. It can create a culture of students carrying over knowledge of chapter operation year-after-year.
- Identify eligible students early in the semester. This could begin when grades are posted at the end of the Fall and Spring semesters.
- When there is a tie in the students' GPA or you round GPAs, give the benefit to the students by inviting each.
- Follow-up with eligible students who do not initially respond. Provide them with information about your chapter and/or direct them to the Phi Alpha website <https://phialppha.org>.
- Encourage students to include in resumes and job/school applications that their honor society is certified by ACHS.
- Promote the fact that Phi Alpha membership is a lifetime membership. When BSW graduate they become alumni. When they return to school as a graduate or doctoral student, they are automatically members, no membership fee.
- To support students who have financial challenges, take advantage of the two free memberships available to each chapter each year.

2. Applications

- Some advisors have created their own using google forms, JotForms, excel.
- Issue an invitation to apply and have inductees complete the invitation online through a system that also takes their payments.

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- Gather important information like their contact information and the name they want on their certificate. Populate that information into a spreadsheet to maintain a running list of members and also have the necessary information to order certificates.
- [Tammy Hamilton at the home office has an individual membership template available for advisors to modify for student applications.](#)

3. Inductions

- Induct students each semester. The GPA separating the top 35% and the lower 65% change every semester. A student who was not eligible one semester may be eligible the next.
- Induct students as soon as they are eligible; for those who are eligible as juniors, this will ensure they can be active during senior year.
- Induct after first semester for those Advanced Standing MSW students who can only be active one semester during grad school.
- Phi Alpha has an open enrollment policy. Therefore, it is never too late to induct students (e.g., if a chapter is unable to hold the induction ceremony as planned or a student was not able to attend the ceremony).
- If some officers are not able to sign the certificates, ask for permission for the president or advisor to sign their names.

VI. MEMBERSHIP INVITATION

Sample Letter

Dear _____ :

You have met the requirements for membership in the Phi Alpha Honor Society. In recognition of your outstanding scholastic record and demonstrated interest in social work, the *(name of college)* Phi Alpha Chapter invites you to register for membership in Phi Alpha Honor Society, the International Honor Society in Social Work. Phi Alpha Honor Society is certified by the Association of College Honor Societies (ACHS) <https://www.achsnaatl.org/>. We look forward to having you join our chapter, which offers award, scholarship, and grant opportunities and involvement in social and service activities, as well as scholarly recognition.

The induction ceremony will take place on *(date)*. Family and friends are invited. Please contact *(advisor)* or *(chapter president)* *(or offer meeting date, time, place)* to learn more about the benefits and your commitment to participate in Phi Alpha programs and events as a member of Phi Alpha Honor Society.

We will acknowledge your acceptance of this invitation when you pay *(select one)*:

(A) the \$30 lifetime international fee

(B) the \$30 lifetime international fee and the \$xx chapter fee *(as reflected in your chapter bylaws)* by the deadline of *(date)*. You may present a check or money order to *(name of college)* Phi Alpha Chapter. Please return both to *(name and address)* by *(date)*. Also, please note how many guests will attend the induction ceremony so accommodations may be made for everyone planning to attend. At the induction ceremony *(date and place)* you will receive a membership certificate, lapel pin, and membership card.

We congratulate you on your academic achievements and look forward to your acceptance of this invitation to lifetime membership in Phi Alpha Honor Society. *Optional: You may order online a Phi Alpha honor cord, medallion, and/or stole to wear during the induction ceremony and/or graduation. Please contact (chapter president) for more information.*

Benefits of Membership

- Promotes humanitarian goals and ideas
- Provides grants, awards, and scholarships
- Recognition of academic excellence
- Social Work's internationally recognized honor society
- Social Work's largest honor society
- Membership in the Association of College Honor Societies (ACHS)
- Respected by employers, social workers, and college admissions
- National presentation opportunities
- Lifetime membership
- Membership certificate, lapel pin, and membership card

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Promotes Bonds Among Students

- Induction ceremony
- Local chapter meetings
- Leadership opportunities

Promotes Humanitarian Goals & Ideals

- Community service projects
- Volunteer opportunities
- Alumni participation
- Mentoring

Provides Grants, Awards, & Scholarships

- Chapter service awards
- Patty Biggs-Wahlberg Scholarship
- Student leadership Award
- Advisor of the Year Award
- Poster Presentation Competition
- Chapter grants
- MSW Scholarship
- Student travel grants
- Community service grants

For more information about Phi Alpha, visit <https://www.phialpha.org>. We are proud to be members of the Association of College Honor Societies (ACHS), the only organization that certifies college honor societies. <https://www.achsnatl.org/>.

VII. INDUCTION CEREMONY SCRIPT

<https://www.phialpha.org/assets/phi-alpha-honor-society-initiation-ceremony.pdf>

PRESIDENT: Welcome to both established and new Phi Alpha Members, Social Work Faculty and Staff and all family members and friends. I am proud to have each of you here to share in this special day. We are here for the purpose of inducting new members into the (*Your chapter name of Phi Alpha*). The purpose of Phi Alpha Honor Society is to provide a closer bond among students of social work and promote humanitarian goals and ideals. Phi Alpha Honor Society fosters high standards of education for social workers and invites into membership those who have excellence in scholarship and achievement in social work. Phi Alpha Honor Society's slogan that embraces their purpose is "Through Knowledge-the Challenge to Serve." I would like to introduce to you (*person*) who will share with you the history of Phi Alpha Honor Society.

(*Person*): The concept of a national social work honor society came from a group of undergraduate social work students at Michigan State University in 1960. Investigation revealed that local chapters existed at

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three schools. Those three schools, along with a few other schools, formed a National Honor society Committee in November 1960. For more than a year this committee worked on the constitution and other administrative matters. The name Phi Alpha and the key were adopted from the local chapter which existed at Florida State University. The constitution and formal organization were completed in 1962, and six chapters qualified to become "charter chapters." Those charter chapters were Florida State, Michigan State University, Ohio Northern University, Central State College, University of Dayton and the University of Tennessee. Over 400 chapters of Phi Alpha are now in existence, and the addition of new chapters is continuing. The (*Your schools chapter name*) was formed in (date).

PRESIDENT: Thank you (*Persons name*). Could all new members of Phi Alpha Honor Society please come to the front?

(*New members come to the front and are given candles.*)

VICE-PRESIDENT: The highest honor that one can receive in Social Work at (*institution's name*) is being extended to you now because you are a proven candidate for induction into Phi Alpha Honor Society and have met all the requirements of our organization. We have chosen to call this society Phi Alpha which means "love of humanity," and we have adopted the colors blue and gold. You have been selected by our Chapter to become members of this international social work honor society because you have evidenced an interest in the profession of social work; you have attained academic excellence not only in social work education, but also in all other academic areas; and we believe you are dedicated to the idea of service to humanity. You have also demonstrated a commitment to the standards, ethics, and goals of the social work profession. (*Person's name*), could you please join us and guide us in the lighting of the peace candles?

(*Person's name*)- explains the Peace Candle and instructs members on lighting - ****Peace candle instructions herein below****

SECRETARY: *Mister/Madame* President, I have the honor of presenting to you the following candidates who have earned membership in Phi Alpha Honor Society. These candidates have been examined and found qualified for membership under our Bylaws. They have been elected by this society on the basis of their scholarly achievement and interest in social work.

PRESIDENT: I congratulate you and welcome you into the (*your chapters name*) of the Phi Alpha Honor Society.

PRESIDENT: You have chosen and are now about to be given the charge and purposes of Phi Alpha Honor Society. If you agree to these charges and purposes, please answer "I do" after I have read each statement.

- Do you agree to recognize and encourage scholastic achievement among the students who are majoring in Social Work? Please answer "I do." (*Pause for response.*)
- Do you agree to improve and further the goals and objectives of Social Work by: Encouraging objectivity and awareness of current developments and practices in the various fields of social work? Please answer "I do." (*Pause for response.*)
- And also further these goals by stimulating research in preparation for a career in social work? Please answer "I do." (*Pause for response.*)

Repeat this pledge after me: Now that I (*state your name*) have become an active member of Phi Alpha Honor Society, I will uphold its dignity and promote its goals and high ideals as a student as well as in professional life. I will actively participate in meetings and Chapter projects and endeavor to maintain a high scholastic average. You may now please extinguish your candles. (*Officers collect candles*) After your

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name is called, please come forward and accept your Phi Alpha certificate from (*Persons name*) –(*calls the names of new members from the program*)

PRESIDENT: Congratulations on your newly acquired membership. May you encourage its growth through your continued association and assistance, and may you also uphold the charges and purposes of Phi Alpha Honor Society to which you have just agreed.

PLEASE JOIN ME IN CONGRATULATING OUR NEWEST MEMBERS OF THE (CHAPTERS NAME) CHAPTER OF THE PHI ALPHA HONOR SOCIETY!!!

Peace Candle Instructions - The World Peace Flame

The Mother World Peace Flame burns continually in Snowdonia National Park in Wales. The World Peace Flame was born of seven Millennium Flames of Hope, which were lighted by peacemakers and spiritual elders on five continents. These flames were then flown to England by military air forces to be united. Sponsored by the Life Foundation, the Flame has been the Source Flame for more than 10,000,000 World Peace Flames now burning around the world. The World Peace Flame has been burned in sacred ceremonies, in parliaments, on peace walks, in prayer groups, at the bedsides of the ill and dying, in homes and schools throughout the world. The candle you are holding is lighted from my World Peace Flame candle, which was itself lighted from a candle lighted from the original. You, too, are now a Guardian of the Flame and of Peace. You, as members of Phi Alpha Honor Society, represent the brightest and best in the field of Social Work. Always use the intelligence and scholarship you hold as ways of honoring all life. When you light your candle, please hold in your heart and mind the intention of World Peace. The act of lighting the candle brings peace to you and to others just by your intention. Light the candle, take a deep breath, and imagine that you send Peace throughout the world when you exhale. Also, please light many, many candles for others and pass along the flame of peace!

For more information, visit www.worldpeaceflame.org

VIII. CHAPTER MEETINGS

A. Meeting requirements

Each chapter shall determine the number of meetings to be held during the year and report the same on the Chapter Year-End Report in a format and containing the information required by Phi Alpha. Each chapter is required to have a minimum of one meeting a year to hold elections.

B. Meeting Tips

- Record the meetings for members who are unable to attend. If they want to be counted as having participated, then you watch the recording within a week and then you give feedback to the secretary treasurer about the recording.
- Use Canvas LMS page to communicate and house documents, meeting recordings, etc.
- Online guest speakers can come from all over the country, not just your community.
- Invite an ASWB representative to talk about the licensing exam.
- Online Jeopardy! Pick a theme (e.g., code of ethics) and prepare in advance.
- Give away/raffle t-shirts to encourage attendance.
- Combine in-person and online attendees. Use a moderator to help keep the online attendees engaged.

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- Consider stress/mental health as a meeting topic.
- Conduct a survey monkey poll to determine the most convenient time to meet.
- Use a virtual platform (e.g., Zoom).
- Consider a rotating schedule of meetings (e.g., officers meet the first Tuesday of the month, full membership meets second Tuesday; host a professional development meeting on the third Tuesday that is open to the entire social work department, the faculty and all the learners).
- Use Capella Connect, similar to Facebook page, to engage, post meeting announcements, other articles., etc.
- Have regular officer meetings to plan activities, track volunteer hours, etc.
- Connect with your Career Services department for topics/speakers.
- Ask students what their interests are and what would they like to hear speakers speak about and then find people (faculty, field instructors, contacts in other organizations) who have that knowledge and interest.
- Consider licensure prep, alumni networking, TED talks.
- For self care, consider meditation or some type of body movement (e.g., Tai Chi).
- For mental health, consider a Mental Health Check-in.

IX. CHAPTER FUNDRAISING

A. Fundraising Requirements

Chapters are not required to raise money but may find it helpful in order to complete service activities or other chapter activities.

B. Fundraising

- Many chapters have garage sales, canned food drives, or bake sales. Items not sold are donated to local Goodwill Industries, Families in Crisis or local domestic violence shelters.
- Our student organization has used in the past company called Group Raise (<https://www.groupraise.com/>). They typically will ask you for your tax-exempt status. You basically then pick a date at a certain restaurant or something and then part of the proceeds for takeout will go to the organization.
- Candy bar fundraiser. We have a local candy company and their candy bars are super good. And we buy them for 50 cents sell them for \$1. And we're face to face on our campus. But even if we weren't, we have students who are in field placements and they can put a box of these out. We can make usually about \$200; we use that money towards graduation cords which we get from Phi Alpha and the students love that so that works pretty well for us.
- Phi Alpha T shirts/merchandise. *Note: You are welcome to use our logo to sell print and sell t shirts and merchandise, things like that. (Note: see Chapter handbook for more information about using the Phi Alpha Logo.*
- A silent auction with photographs and other things they've gotten donated. And so that's worked very well because they can do it online (e.g. eBay).

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X. CHAPTER SERVICE ACTIVITIES

A. Service Requirements

Please note that chapters are not required to complete Phi Alpha service activities, but in the spirit of Phi Alpha, we definitely encourage chapters to do so.

B. Service Activity Ideas

Ideas from previous Phi Alpha Activities. Also visit <https://www.phialpha.org/scholarshipsawards.html>

Phi Alpha National Service Project - Special Olympics

- <https://phialpha.org/national-service-project-resources/>
- Local Chapter contact person: Mariah Conrad – MariahC@partnerspip.com
- Main Page – [Special Olympics](#)
- Becoming a volunteer (simple) – [Become a Volunteer \(specialolympics.org\)](#)
- Finding a program – [Programs \(specialolympics.org\)](#)
- Volunteer Training Resources: This source will give you 11 different training on how to become an effective Special Olympics volunteer. There are a lot of different pdf's to look though (I.e. Orientation, volunteer jobs, handbook, protective behaviors, supervision, recruitment, recognition, etc.) [Volunteer Training \(specialolympics.org\)](#)
- Recommended: go through the coaching handbooks. They will give you information on how to interact with and teach athletes with various disabilities (e.g., Autism, physical disabilities, hearing or visual impairments, etc.).
- Olympics Resource library: [Special Olympics Resources](#)

Comprehensive community resource list

- Create a comprehensive community resource list for students and faculty at your university.

Independent Service Activities

- One member spent four hours in the parking lot of Sam's Club taking the carts in to help out during freezing cold weather.
- One person cleaned up the dog poop from every place in her apartment complex to make it better for everybody.
- **Random Acts of Kindness Week (February)** <https://www.randomactsofkindness.org/> This website provides calendars and activities. Members can do individual things based on what their communities need. This can be especially useful for online programs with students located in different towns/states. This is a way for all students to work together during a common timeframe yet also work independently in their communities.

Mentoring

- Consider starting a program where Phi Alpha members will be “mentors” to Freshman and Sophomore.
- Consider mentoring or second year MSW students to incoming first year MSW students and advanced standing students.

Food Pantry

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- The SW Club sponsors our food pantry. We started a yearly workshop and hope to continue it.

COVID-19 Masks

- Consider virtual volunteering. Collect masks for senior adults who are members of a local community center. Students sign up online to say how many masks they will donate (buy them, make them, or ask someone to make them). Establish a couple of collection dates and times in a parking lot when students can drop by and leave masks in a box to stay physically distant. Then deliver masks to the director of the senior center.

Safety Posters

- During the summer, Phi Alpha members distributed "See and Save" posters to increase awareness of safety issues related to swimming pools, car seat safety for children, etc.

Donation Boxes

- Phi Alpha members collected school supplies via donation boxes throughout the campus. Members spent a Saturday outside a store asking people who were entering the store to buy school supplies and donate them. The collection amount was over \$1000.00 of supplies and an additional \$600.00 in cash donations used to purchase additional supplies. All of these supplies were distributed to Communities in Schools social workers for three schools in low income areas to distribute to their clients who could not afford to purchase their supplies. This particular Phi Alpha chapter was rewarded with the President's Volunteer Service Award by the Community Partners and Local Child Welfare Board.

Helping the Homeless

- One chapter hosts an annual national event where Phi Alpha members sleep outside in cardboard boxes to raise homeless awareness is held. Money raised is donated to help fight homelessness.
- Gathering backpacks for the homeless community and involving the whole campus to contribute. Phi Alpha student would promote this and deliver backpacks to the homeless.

Book Drive

- A massive book drive was conducted that resulted in both a children's and adult's library at a local homeless shelter.

Inner-City Child

- An Easter egg party was held for an inner-city church preschool. Refreshments, arts, crafts, and an Easter egg hunt were provided for the children.

Online/virtual

- Encourage students to be involved with voter registration. Much of the work can be done online.
- Virtual volunteering can be done through the 211-call system.
- Explore www.volunteermatch.org. This website can filter by distance, population, etc. and provide virtual opportunities to serve.
- Online tutoring with K through 12 students
- We had a student who sells health care products. She has her own business. It's a franchise and she was able to get quite a bit of product: bottled water, fizzy thing, snacks and she recruited people from Phi Alpha and our social work club to help her. She came up with almost \$700 worth of product that she delivered to our local hospital and they really appreciated that. So that's something that she did that entirely online.
- 7 Cups. <https://www.7cups.com/> Become a trained volunteer listener to give emotional support over online chat.

XI. ENGAGING ALUMNI TIPS

- Invite and include alumni in inductions, especially virtual inductions. We are going to have virtual inductions now.
- Ask them to be speakers or maybe just do a little training at monthly meetings.
- Consider a panel discussion of alumni were working in a variety of different areas to talk about the process of transitioning from school to the workforce, job opportunities, tips for job hunting, etc.
- Hold an alumni holiday party.
- Invite alumni to speak at or facilitate induction ceremonies.
- Start a mentoring program for social work courses at the undergrad level using current and alumni members.
- Ask alumni to donate.

XII. CALENDAR FOR CHAPTER ACTIVITIES

Prefall/Late-Spring or Summer

- Draft a written plan of action for the chapter's activities for the upcoming year, including at least one activity that promotes scholarship, community service, and leadership development.
- Schedule officer meetings to prepare agendas for regular meetings and to plan and evaluate all activities (regular monthly membership meetings, field trips, conferences, induction ceremonies, community service projects, graduations, social events).
- Officers draft a budget.
- Submit **Chapter Grant** application (deadline for fall grant is September 1st).
<https://www.phialpha.org/programs.html>

First regular business meeting

- Membership approves calendar of events and budget.
- Assign committee members.
- Treasurer collects chapter dues.
- Officers finalize Phi Alpha schedule on the college activities calendar.
- Finalize a written plan of action for the chapter's activities for the year, including at least one activity that promotes scholarship, community service, and leadership development.

Fall

- Programs, field trips and regular meetings.
- Community service project.
- Social function.
- Submit **Chapter Grant** application (deadline for spring grant is January 1st).
<https://www.phialpha.org/programs.html>

Winter

- Programs, field trips and regular meetings.
- Community service project.
- Social function.

Spring

- Plan induction recruitment and ceremony (see Phi Alpha Induction checklist).
- Recruitment drive - request \$100 **Chapter Support** grant for information session.
<https://www.phialpha.org/programs.html>
- Request **Student Membership Support** grants (up to 2), if needed.
<https://www.phialpha.org/programs.html>
- Complete and submit certificate order form with new officer names and inductee names.
<https://www.phialpha.org/order-certificates.html>
- Order merchandise <https://www.phialpha.org/order-merchandise.html>
- Hold induction ceremony.
- Hold end-of-year social function.
- Elect new officers.
- Prepare award competition submissions – deadline is May 31st for each of the following:
 - **Chapter Service Award**
 - **Patty Gibbs-Wahlberg Scholarship**

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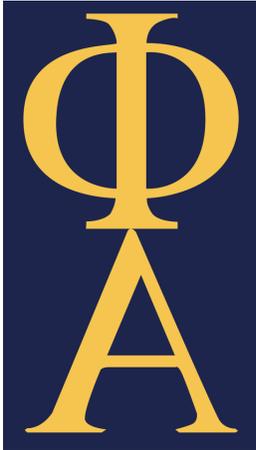
- **Advisor of the Year Award**
- **Student Leadership Award**
- **MSW Scholarship**
<https://www.phialpha.org/programs.html>
- Submit Chapter Year-End report to Phi Alpha Executive Director by May 31st
<https://www.phialpha.org/>
- File most recent copy of Chapter Bylaws with the international office, if amended during the year.
- Complete the Chapter Self-Assessment to assess chapter support, development, and learning.
- Please note that deadlines, details, and requirements for any of the awards and/or grants are subject to change by Phi Alpha Honor Society, in its sole and absolute discretion.

XIII. NAME, SYMBOL, LOGO USAGE

A. Our Name.

The full name of the organization is Phi Alpha Honor Society.

B. Our Symbol



The Phi Alpha logo, which is protected by copyright, is a stacked banner upon which two Greek letters appear, Phi and Alpha. Phi Alpha colors are blue and gold as established by the International Honor Society Committee. Royal blue and light gold are preferred. Any deviation from the standard must be approved by the International Board prior to its use.

C. Criteria for Use of Logo

To protect the integrity of Phi Alpha emblems and safeguard the value of membership, Phi Alpha's logo may only be used on merchandise that is being sold or given to members (e.g., sweatshirts, t-shirts). The name or Greek letters representing Phi Alpha or the chapter name can appear on these items with the exception of academic or honors regalia. Academic and honors regalia is available through the Phi Alpha website <https://www.phialpha.org/order-merchandise.html>. Chapters may use the Phi Alpha logo on chapter stationery, flyers, business cards, decorated cakes, cookies and cupcakes, etc., which are not offered for sale. Any use of Phi Alpha's logo or name should be tasteful, non-offensive, and non-discriminatory. If the Chapter has any question regarding the use of the Phi Alpha logo or name, then the Chapter's Advisor may contact International Office for direction. Each Chapter is responsible for its use of the Phi Alpha logo and/or name in a respectful and proper manner.

The Phi Alpha logo may not be used by unauthorized vendors seeking to profit from its use (e.g., rings, jewelry, stoles, honor cords, medallions, promotional items.) Please contact Phi Alpha for a list of authorized vendors or if your desired vendor would like to become authorized by Phi Alpha.

D. Graphics for Download

Phi Alpha logos are available as a jpeg for official Chapter use. Please request the logo from the International Office, along with details as to its use.

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XIV. CERTIFICATES, LAPEL PINS, MEMBERSHIP CARDS, AND MERCHANDISE

A. Certificates, Lapel Pins, Membership Cards

Go to <http://www.phialpha.org/order-certificates.html> to download the Certificate Order Form Request and send an email to Tammy Hamilton (phialphainfo@etsu.edu) with your chapter name in the subject line.

Be sure to include the following:

- School Name
- Name(s) of Students Inducted
- Name(s) of Honorary Members
- Date to appear in certificates
- Mailing address for the certificates
- Submit ONE (1) check or money order. Please note if you would like priority delivery (optional), include \$10.00 for postage.

Certificates, lapel pins, and membership cards will be mailed to one location upon receipt of payment.

Merchandise available from Phi Alpha <http://www.phialpha.org/order-merchandise.html> Current pricing is as follows, but always confirm pricing, since it may change, prior to ordering.

- Phi Alpha Hanging Banner \$60.00
- Phi Alpha Blue & Gold Honor Cord \$12.00
- Phi Alpha Stole \$25.00

Phi Alpha medallions are available through The Trophy Shop www.trophyshopinc.com. Please contact International Office regarding ordering of the same.

B. FAQs

- **What about damaged or lost certificates?** We are happy to replace those at no cost.
- **What about electronic certificates?** We can send you an E file for certificates. Please note that these will not have the official Phi Alpha seal.
- **Where can certificates/merchandise be mailed?** We can mail certificates/merchandise to the home address of the advisor. For students: there will be a shipping cost for each individual shipment.

XV. SOCIAL MEDIA GUIDELINES

Social networks can be a great opportunity for your Phi Alpha chapter to promote awareness of your organization, awareness of a cause, as well as campus events. You should at all times maintain a professional, positive, and respectful demeanor on your social networking platforms.

A. Social Media: Getting Started

1. Form a strategy

- Which platforms do you want to use: Facebook? Twitter? Instagram? Snapchat? You may wish to link all of your social media together so that messages are being seen on multiple formats without requiring additional postings.
- Identify your purpose, audience, types of content you intend to share and your organization's overarching goals.
- Think about which social media platforms students are using today.

2. Set your goals

- Are you trying to communicate a campaign; promote your student organization/department/program; connect with alumni; create a community for fans; or increase overall awareness of your group?

3. Developing a social media plan

- Plan out who will be responsible for posting and monitoring social media pages.
- Find a unified voice that speaks to your target audiences.
- Establish basic policies for posting and monitoring social media to remain consistent with messages.
- Consider the name and title for each account as that will add consistency and clarity for users.
- Also, don't forget to become familiar with rules/policies governing the social media pages the organization decides to utilize. This includes agreement to not post material that is protected by copyright agreements.
- Make sure that any information shared on the social media platforms in within the college's or university's guidelines for social media or internet postings, meets the requirements for student activity and inclusion, and does not violate any rules or regulations set forth by the college or university related to student or teacher conduct.

4. Setting up your account

- When creating a username be prepared to stick with it. Some sites won't let you change a username once it is set. The username should be related to the organization and not to an individual member.
- When possible, have your advisor serve as an administrator on their social media pages. When leadership within the organization changes, the advisor will still be able to grant access to new organization officers.

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B. Best Practices for Social Media Pages

1. Be Authentic

- Be open about your identity and professional affiliations.
- Keep deletions to a minimum; only remove content that is clearly offensive or spam. If necessary, limit comments or block comments after a certain period of time.
- Admit mistakes and be upfront and prompt with corrections.
- Never post information where you do not have first-hand knowledge. Post a link directly to the source of the information. For example, post a link to the National Weather Service for a weather alert. Make reasonable attempts to verify that the information posted is factually correct and be mindful of posting information from sites which do not readily check their sources.

2. Be Sensible

- Check for accuracy before posting. Make sure you have proper permissions to post written content, images, and videos. Be careful not to post confidential information.
- Use proper etiquette – be constructive and respectful, don't speak poorly of other clubs, organizations, universities, or institutions.
- Use proper grammar so your message is clear and concise.
- Be thoughtful about controversial or volatile topics. Many times it may be best to leave them out of the conversation.
- Avoid posting content (words, images, etc.) that others may find offensive.
- Ensure that content posted represents your chapter and Phi Alpha in the best light.
- Social media sites will hold individuals liable for any content or material posted to their site. Social media site users should be familiar with the Terms of Service for the social media outlet they choose to use and respect general copyright, trademark, and Fair Use policies.

3. Be Vigilant

- Questions and concerns (as well as compliments) should receive quick responses: an appropriate goal is to respond within 24-36 hours, with shorter response times being even more desirable.
- Keep social media profiles/pages updated with fresh content. A good goal is at least one new post per week. If you are no longer able to maintain and monitor the page, assign the task to another club member or delete the profile/page.
- Make sure to quickly update information related to any events (especially cancellations, delays, or venue changes) which are being hosted or promoted by your chapter.

4. Be Available

- All club profiles/pages should include a contact e-mail address.

5. Be Interesting

- Use a natural and conversational tone.
- Post a variety of content using multiple media (text, photo, video, poll questions, etc.)

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XVI. LIABILITY AND RISK REDUCTION

One of the most frequently asked questions about advising student groups concerns the legal liability of the advisor. In general, the advisor has accepted a position of faculty advisor to a student group as part of the job. The advisor should not be held personally liable for mistakes as long as the organization is not engaged in an activity which is illegal and as long as there is no negligence involved in the performance of the advisor's function. The use of "common sense is one's best guide" to determine what needs to be done is appropriate in most situations. Please refer to the Phi Alpha Risk Management Policy below as well as to your school's student organization policies.

Although there is no way to completely eliminate risk and legal liability associated with a program or event, there are ways to reduce risk and provide a safer environment for program participants. Here are a few things that your organization can do to identify and reduce risk:

- Complete a Pre-Event Planning Form to clarify the needs and expectations of participants. <https://www.etsu.edu/students/sorc/documents/event-planning-checklist-for-student-organizations.pdf>
- Identify specific risks involved in the event. These could include physical risks (such as an event with physical activity) and liability risks (such as events involving alcohol, minors, or travel).
- Be sure to follow your school's policies and procedures for student organization activities.
- Take advantage of insurance coverage offered by the school for student organizations to the extent financially responsible for the chapter.
- Identify options for reducing risks by including, but not limited to:
 - Hiring a third party vendor or contractor.
 - Preparing liability waivers.
 - Providing advanced training.
 - Assuming a 'worst case scenario' and preparing for it in order to reduce likelihood of it occurring.
 - Utilizing waivers that outline the specific nature and risk associated with the event.
 - Canceling the event if the conditions are dangerous or the group is not prepared to assume full responsibility for the risk involved.
- Assess the capability of the group to manage risk.
- Identify the challenges in managing risk, as well as resources to assist in your planning.
- Develop a plan of action in reducing risk.
- Communicate with everyone involved (officers, members, advisors, participants, and facilities staff).

XVII. PARLIAMENTARY PROCEDURE

Many leaders of organizations may worry about their lack of knowledge and experience with Parliamentary Procedure. While it is true that a basic knowledge of the “fundamentals” will be helpful, your Chapter should determine how to best run your meetings based on the type of organization and the purpose of the meeting. Strict adherence to Robert’s Rules of Order is not appropriate for EVERY group.

A. Agenda

The first thing an officer should know is the order of business so that an agenda for the meeting can be made. Although there are no formal rules governing this, most groups use the following procedure:

1. Call to Order
2. Attendance recorded
3. Special program—speaker, induction of members and officers, etc.
4. Reading and approval of minutes
5. Officer’s reports
 - a. Treasurer’s report
 - b. Other officers’ reports (if any)
6. Committee reports
7. Old business
8. New business
9. Adjournment
10. Recreation and refreshments

B. The Main Motion

The object of the main motion is to introduce new business for consideration by the group. There can only be one main motion under consideration at a time. The motion must be voted upon, tabled until a future specific time, or removed from consideration prior to considering another motion.

Step 1: A member rises and addresses the presiding officer by saying, “Madame/Mister President.”

Step 2: The president recognizes the member by calling him/her by name.

Step 3: The member states, “I move that our organization....” A member may explain in advance why he is introducing a motion. It should not, however, become a debate. The maker of a motion is entitled to speak first in favor of the motion. He may NOT speak against the motion in discussion, but may withdraw it or vote against it. Lengthy motions should be written out and given to the secretary.

Step 4: Another member seconds the motion by saying, “I second the motion,” or just “second.” If members are slow in seconding a ROUTINE motion, the president may proceed without a second when it appears the group is in agreement on the question.

Step 5: The president repeats the motion so that everyone understands the proposal. “It is moved and seconded that our organization”

Step 6: The president calls for discussion by saying, “The motion is now open for discussion.” Each member has the right to speak TWICE on the same question, but can only do so after all members

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who wish to speak have had an opportunity to do so. A member who discusses matters which are in no way are connected with the business at hand, or who speaks longer than 10 minutes, is out of order and the President should notify the member that their opportunity to speak is up and to open the floor for the next member to speak.

Step 7: The president calls for the vote after the discussion has obviously stopped by saying, "Are you ready for the question?" Ordinarily there is no answer to call for the vote. If the president is slow in calling the vote, a member may say, "Question." It is rude to interfere with the right of those who wish to speak by shouting "Question." The calling of "Question" does not stop the discussion. The president should take the vote by saying, "Those in favor of the motion that...say 'aye.' Those opposed, say 'no.'" If the president doubts the outcome of a voice vote, she/he should call for another by saying, "There seems to be some doubt regarding the vote; will those in favor raise your right hands?" Votes are counted. "Those opposed, raise your right hands." Votes are counted. If there is still some doubt, a standing vote may be taken.

Step 8: The president announces the result of the voting by saying, "the 'ayes' have it, the motion is carried," or "the 'nos' have it, the motion is lost." If a counted vote is taken, the number voting for and against the motion should be announced and documented in the minutes for the meeting. The president should also state what the resulting action will be. (Time to appoint a committee if necessary.) The motion is always lost in a tie vote if the president does not choose to change the result. The president may also choose to bring the result to a tie by voting so the motion will lose. (If the vote is 16-yes and 15-no, the president may vote "no" making a 16-16 tie and causing the motion to be lost.)

The Chapter should review Roberts Rules of Order regarding any procedure not addressed herein or in the Phi Alpha Honor Society Bylaws or Rules and Regulation promulgated by Phi Alpha, as the same may be amended or modified from time to time.

XVIII. RISK MANAGEMENT POLICY OF PHI ALPHA

The Risk Management Policy of Phi Alpha includes the provisions which follow and shall apply to all honor society entities and all levels of honor society membership.

Alcohol and Drugs

- The possession, use, and/or consumption of **alcoholic beverages**, during an official event, or in any situation sponsored or endorsed by the chapter, must be in compliance with any and all applicable laws of the state, county, city, university, and other institutions.
- No alcoholic beverages may be purchased through the chapter treasury nor may the purchase of same for members or guests be undertaken or coordinated by any member in the name of or on behalf of the chapter.
- No chapter members, collectively or individually, shall purchase for, serve to, or sell alcoholic beverages to any minor.
- The possession, sale, and/or use of any **illegal drugs or controlled substances** at any chapter sponsored or endorsed event, or at any event that an observer would associate with the honor society, is strictly prohibited.
- No chapter may co-sponsor an event with a charitable organization, alcohol distributor, or tavern where alcohol is given away, sold, or otherwise provided to those present.
- No chapter may co-sponsor or co-finance a function where alcohol is purchased by any of the host chapters, groups, or organizations.
- No underage consumption of alcoholic beverages or any use of drugs in an illegal manner is allowed.

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- Be mindful of the way you are representing Phi Alpha.

Safety

All chapters shall comply with local fire and health codes and standards for ceremonial and food functions.

Abuse

No chapter may conduct activities or social media posts that could reasonably create embarrassment, harassment, or ridicule, nor any other activities that are not consistent with the regulations and policies of their educational institution or Phi Alpha.

Civil Rights

Membership in Phi Alpha is open, without restriction as to race, creed, sex, national origin, conditions of handicap, sexual orientation, and gender identification, or gender expression.

Education and Compliance

An annual review of the Risk Management Policy of Phi Alpha is required of each chapter. The chapter must take reasonable steps to insure compliance with all provisions of the risk management policy at all times.

Liability Waiver

A waiver is provided for Phi Alpha Honor Society for Social Work chapters to use when conducting activities regardless of risk. It is the responsibility and requirement of each chapter to assess risk and determine when and how participant information is collected or retained. Every student, non-student, faculty, staff, and community member involved in the chapter activity must complete the form. The form will be kept by the chapter for at least one year. If the participant is a minor, the form will be kept until one year after her/his 18th birthday. Please note that personal injury laws vary from jurisdiction to jurisdiction and the chapter should consult local counsel to verify that this will adequately protect the chapter from liability. Any chapter using this form takes full responsibility for its use and hereby holds Phi Alpha Honor Society harmless. See the [LIABILITY WAIVER](#) section attached hereto for further reference.

XIX. INTERNATIONAL BYLAWS AND RULES CONTROL

The Bylaws for Phi Alpha Honor Society, as well as any rules or regulations promulgated by Phi Alpha Honor Society, as amended from time to time (collectively, the “International Bylaws”), shall control over any and all chapter bylaws, rules, regulations, actions, non-action, relationships, etc. and may not be superseded by the same. Any discrepancies are to be decided taking all consideration to the International Bylaws first, with any discrepancy not otherwise specifically stated or implied by such International Bylaws being decided by the Chapter’s bylaws. Nothing herein as it relates to chapters shall supersede the rules and regulations of the school, except as such may be subject to a choice of laws provisions or outside of the school’s governing power.

XX. PHI ALPHA GOOD STANDING AND COMPLIANCE

By becoming and/or continuing to be a chapter in Phi Alpha Honor Society, you acknowledge and agree that your chapter must comply with the Charter, Bylaws, Rules and Regulations of Phi Alpha Honor Society, as the same may be periodically modified, deleted, and added. Your chapter must remain in good standing with the International Office to continue to utilize any resources and/or benefits of Phi Alpha. Failure to maintain your chapter in good standing, as well as any other matters as detailed or contemplated in the Phi Alpha Bylaws and organizational documents, may result in disciplinary action begin taken, up to and including, your chapter's charter being revoked.

XXI. LIABILITY WAIVER FORM

<https://www.phialpha.org/assets/liability-waiver-document.pdf>

This form is provided as an example only for Phi Alpha Honor Society for Social Work chapters to use when conducting activities regardless of risk. It is the responsibility and requirement of each chapter to assess risk and determine when and how participant information is collected or retained. Every student, non-student, faculty, staff, and community member involved in the chapter activity must complete the form. The form will be kept by the chapter for at least one year. If the participant is a minor, the form will be kept until one year after her/his 18th birthday. Please note that personal injury laws vary from jurisdiction to jurisdiction and the chapter should consult local counsel to verify that this will adequately protect the chapter from liability. This form is for example only. Any chapter using this form takes full responsibility for its use and hereby holds Phi Alpha Honor Society for Social Work harmless.

Participation Information and Release Form

Print legibly

Participant's Full Name: _____ Student or Other ID#: _____

Organization Name: _____

Activity Title: _____ Date of Activity: _____

PLEASE READ THIS ENTIRE DOCUMENT CAREFULLY BEFORE SIGNING. THIS RELEASES PHI ALPHA HONOR SOCIETY, THE UNIVERSITY, and THE UNIVERSITY CHAPTER FROM ANY LIABILITY RESULTING FROM PARTICIPATION IN ANY ACTIVITY ASSOCIATED WITH THE CHAPTER, INCLUDING, BUT NOT LIMITED TO, THE ACTIVITY DESCRIBED ABOVE.

Release and Assumption of Risk

The undersigned hereby acknowledges that he/she understands that participation in the above named chapter activity is purely voluntary. In consideration of the university or Phi Alpha Honor Society making any funds, equipment, and/or facilities available in the past, presently or in the future for the chapter's activity or providing organizational support or planning, the undersigned hereby releases Phi Alpha Honor Society, the chapter, the university, the university's governing body, their successors, assigns, Trustees, officers, agents, volunteers, contractors, and employees from any and all claims, demands and causes of action whatsoever, in any way growing out of or resulting from the undersigned student's or other person's participation in the activity of the chapter, whether directly and/or indirectly.

The undersigned further agrees that he/she understands that any activity of the chapter may involve substantial risk and could lead to **bodily, emotional, or mental injury, illness, paralysis, permanent disability, death, property damage, emotional distress, and/or other dangers associated with participation, involvement or travel to and from the chapter activity.** When activities are physically demanding or athletic in nature other risks associated with participation could include, but are not limited to: **respiratory failure, spine and neck injuries (either of which could result in paralysis), concussion, heart failure, broken bones, heat stroke, heat cramp, heat exhaustion, hypothermia, frostbite, stroke, convulsion, unconsciousness, abrasions, fainting, sudden illness, cramps, and shortness of breath, and/or,** with respect to water activities or activities around water, there is also the risk of drowning. It is the responsibility of the individual participant to assess these risks, consider his/her personal knowledge of and ability to safely participate in each activity prior to participation.

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The undersigned agrees that he or she is solely responsible for any cost arising out of any bodily injury or property damage sustained through participation or other involvement in normal or unusual activities of the chapter. The undersigned is encouraged to obtain adequate bodily injury, health, and/or property damage insurance coverage, and understands that **Phi Alpha Honor Society, the chapter, or the university does not provide any insurance coverage; all injuries suffered during participation or other involvement in a chapter activity are solely their own responsibility and not the responsibility of Phi Alpha Honor Society, the chapter, or the university. If injured while participating or involvement in this activity, I agree to seek medical attention and notify the chapter.**

If the undersigned is a minor (under the age of 18 years), then, in addition to the minor's signature as a participant hereinafter, the signature of the lawful guardian (parent, spouse or other lawful guardian) appearing in the space indicated below signifies acceptance by said lawful guardian on behalf of him/herself and the minor that the terms and conditions hereof shall be binding upon them and shall constitute a release by them of any and all claim, demands and causes of action whatsoever which they or any of them may have against Phi Alpha Honor Society, the chapter, the university, its successors, assigns, Trustees, officers, agents or employees as a result of said minor's participation or involvement in the activities described.

Due to the charitable nature of Phi Alpha Honor Society, it is expected that no alcohol would be served or otherwise provided during an activity.

By executing this Release and Assumption of Risk, I assume all of the risks of bodily injury or property damage associated with participation or other involvement in the activity listed herein and any other activity associated with the chapter.

I HAVE CAREFULLY READ AND UNDERSTAND COMPLETELY THE ABOVE PROVISIONS AND AGREE TO BE BOUND THEREBY:

PARTICIPANT SIGNATURE

DATE

IF UNDER 18 YRS OLD:

PARENT/GUARDIAN/SPOUSE

DATE

XXII. CHAPTER SELF-ASSESSMENT

Rate each item below on a scale of 1-4:

- 4 - We do exceptionally well on this
- 3 - Satisfactory, but room for improvement
- 2 - Sometimes okay, often weak
- 1 - Needs a great deal of improvement

Operational Excellence Benchmarks

- The Chapter actively recruits new members each year.
- Chapter bylaws are current.
- A copy of the current bylaws is on file with the International Office.
- The Chapter has financial stability and a sensible plan for Chapter operations.
- The Chapter has an awareness of potential problems and the ability to solve them before they become problematic.
- Each member is instructed annually on the Risk Management Policy as defined by the International Office.
- The Chapter abides by the current Risk Management Policy.
- The Chapter conducts a yearly evaluation of Chapter service activities.
- The Chapter conducts a yearly evaluation of other programming activities in which it seeks, reviews, and implements feedback on programming.
- Each Chapter member signs a liability waiver at or immediately prior to each Chapter function.
- The Chapter has a written plan of action.
- The Chapter maintains proper records.
- The Chapter Year-End Report is submitted by May 31st each year.
- The Chapter is registered with your school's student affairs/student organizations office.
- The Chapter is in good standing with your school and has met all requirements of your school.

Personal Development and Membership Value Benchmarks

- The Chapter's goals are clearly defined at least once a semester and reflect the interests and needs of the Chapter members at that time.
- The Chapter's desire and acceptance of necessary or beneficial change are enthusiastic and accepted by officers and members alike.
- The Chapter has officers who are able to withstand and impose peer Chapter pressure.
- Officer training is comprehensive in leadership and Chapter operation's information, with officers being challenged to reach beyond "what was done by the previous officer(s)."
- The officers AND members have a strong understanding of the Chapter's purpose and a continuing orientation program for broadening knowledge.
- The members help to generate ideas.
- There is a high degree of member involvement and willingness to assume responsibility.

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- The Chapter has a program that builds strong commitment, friendships, and awareness.
- Members know each other well.

Values-Based Leadership and Service Benchmarks

- The Chapter has a high level of respect and a strong reputation on campus with students, staff, and faculty.
- The Chapter demonstrates the ability to relate and work well with other campus organizations.
- The Chapter performs service activities with participation from most of its members.
- The Chapter incorporates the values of Phi Alpha into all service and philanthropy events.
- The Chapter incorporates periodic reflection after service and philanthropic activities to help members process the experience.

Chapter Advisor Support Benchmarks

- The Advisor acts as a role model.
- The Advisor holds the chapter to high standards.
- The role of the Advisor within the structure of the chapter is discussed and agreed-upon with the Chapter and officers.
- The Advisor works closely with the officers to recruit and induct new members.
- There is strong leadership, influence, and support exerted by advisors by installing a desire to constantly be better.
- The Chapter has good continuity and strong direction because of the Advisor’s experience and willingness to assist.
- The Advisor provides necessary professional or technical support for the Chapter.
- The Advisor regularly participates in Chapter activities.
- The Advisor conducts election of officers and implements officer transition.
- The Advisor informs and promotes chapter participation in national awards and scholarship opportunities.
- The Advisor acts as a liaison with other school officials, community members, etc., as needed.
- The Advisor is familiar with the Chapter bylaws and supports officers and chapter in upholding these rules.
- The Advisor supports officer training.
- The Advisor reviews the Chapter Handbook annually.

Notes/Suggestions:

XXIII. PHI ALPHA CHAPTER YEAR-END REPORT

All Chapters are required to complete this form and submit it to the International Office of Phi Alpha by May 31st each year. This is your Year-End Report.

Date _____ School Year: _____

Chapter Name _____

Chapter website and/or social media account URLs (if applicable) _____

Programs Include (check all that apply):	In-person Program Main Campus	In-person Program Off-Site Locations	On-line Program
BSW/BSSW			
MSW/MSSW			
PhD/DSW			

Financial Information

Your chapter's current account balance? \$ _____ as of _____ (Date)

What are your local membership dues, if applicable (note: this excludes the international one-time fee)?
_____ per year/semester/quarter/other: _____ (*circle one*)

Where does your chapter maintain its funds?

- _____ With the college/university
- _____ In a local/state/federal bank or credit union
- _____ We don't have an account
- _____ Other (please describe): _____

New Member Recruitment

Number of students invited to join _____

Number of students inducted _____

Which method(s) describes your recruitment process this year?

- _____ Mailed a letter/postcard
 - _____ Notified through online methods (social media, email)
 - _____ Held an information meeting/recruitment activity
 - _____ Requested and used the \$100 Chapter Support grant for recruitment
 - _____ Requested and used Student Membership Support Program
 - _____ Other (please describe): _____
-

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Chapter Information

Officers – Please list names of officers below

Officer Title	Current Year	Upcoming Year (if known)
President		
Vice-President		
Secretary		
Treasurer		

Membership totals:

- Collegiate members (including inductees)
- Alumni members who are active with your chapter
- Professional members who are active with your chapter
- Faculty members (including advisors) who are active with your chapter
- Honorary members who are active with your chapter

Which of the following Phi Alpha International scholarships or awards did your chapter apply for this year? (*check all that apply*)

- Advisor of the Year
- Chapter Service Award
- Poster Presentation Competition
- Patty Gibbs-Wahlberg Scholarship
- Student Leadership Award
- Chapter Grants

Chapter Service Activities (please list: (a) activities that your chapter conducted, sponsored, or participated in that were service-related during the most recent school year, and (b) hours volunteered toward the activity. You can count the time spent organizing and preparing for a service activity as well as the time spent on the actual event. Attach a separate page, if necessary.)

<u>Service Activity</u>	<u>Hours</u>

Please provide an estimate of the number of total volunteer service hours contributed by your chapter:

Other Chapter Activities (please list activities that your chapter conducted, sponsored, or participated {such as chapter meetings and inductions, or any activity other than service activities listed hereinbefore} in during the most recent school year. Attach a separate page if necessary.)

I, _____, as Chapter President, hereby warrant that the above Year-End Report has been completed with input from all necessary Advisors, officers and members, that the Chapter Advisor has reviewed the same prior to submission, and that all information therein remains true and accurate to this date to the best of my knowledge.

DATE

PRESIDENT

XXIV. PHI ALPHA GUIDELINES FOR CHARTERING CHAPTERS

Definition: Chartering is the process of starting a new chapter on a campus. Campus officials petition for a chapter. The Phi Alpha International Office will make the determination regarding the approval of the charter for a chapter.

Criteria for chartering chapters shall be for the purpose of upholding the high standards of the membership, creating a cadre of scholars and leaders within social work, and maintaining a chapter committed to serving its membership through a variety of means.

Overview. The process for establishment of collegiate chapters includes:

- formal petition by a college/department within a regionally accredited institution;
- jointly defined relationship between the institution and Phi Alpha;
- chapter bylaws to govern the chapter within the provisions of the Phi Alpha Bylaws;
- collegiate officer and advisor selection by the campus chapter;
- membership invitation by the campus chapter; and
- approval by a two-thirds vote of the Phi Alpha Board of Directors.

Basic guidelines chartering chapters

The following guidelines direct Phi Alpha charter approval to ensure that the chapter will achieve the mission and maintain excellence.

- Phi Alpha expects institutional support for establishing a chapter, including the means required to sustain service to all chapter members so that they benefit from all the rights, privileges, and opportunities afforded through membership in Phi Alpha.
- Phi Alpha requires endorsement of the chapter faculty adviser. This professional must be readily accessible to members and available for activities of the chapter, including opportunities for mentoring, leadership, and participation in chapter projects.
- Phi Alpha may revoke or suspend chapter privileges for non-compliance with society bylaws and practices, policies inconsistent with good business, and/or lack of service to the chapter's membership consistent with society expectations.
- Such other guidelines and requirements as may be contained in Phi Alpha's Bylaws and other rules and regulations promulgated by Phi Alpha, which may be altered, amended, added to, or deleted from at any time.

XXV. CHAPTER APPLICATION

Please provide the following information in order to petition for a Phi Alpha chapter. Your application will be reviewed and voted on by the Phi Alpha Board of Directors.

1. School name _____

2. Programs

___ BSW/BSSW

___ MSW/MSSW

___ PhD/DSW

3. CSWE Accreditation Status

a. Currently accredited by the CSWE? Yes ___ No ___

b. In CSWE candidacy status? Yes ___ No ___

4. Chapter Advisor

Each chapter is required to have an Advisor who is a member of the faculty or has a professional designation (e.g., Director of Field Instruction) within the university. This Advisor should be affiliated with the department that oversees a social work program at that university or college. The Advisor will be designated an Advisor Member of the Society (if not already) and no international membership fees will be assessed as detailed in the Phi Alpha Honor Society Bylaws.

Advisor's Name _____

School Address _____

Telephone Number (s) _____

Primary E-Mail Address _____

Please read and initial the following.

- I have read the Advisor description and responsibilities as outlined in the Phi Alpha Chapter Handbook and Phi Alpha Bylaws. ___
- I have institutional support for a Phi Alpha chapter. ___
- I have the support of my social work program administration for a Phi Alpha chapter. ___
- I agree to provide the necessary mentoring, leadership, and participation for a successful Phi Alpha chapter. ___

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5. Proposed Charter Collegiate Members

Please list a minimum of five (5) students of your proposed Charter, including the required collegiate officers. Students must meet academic qualifications.

1. President _____
2. Vice-President _____
3. Secretary-Treasurer _____
4. _____
5. _____

Please list any additional charter members (optional, please attach an additional sheet of paper with such information)

6. Chapter's Bylaws. Please create and provide a copy of the Chapter's Bylaws. (A template of model Bylaws is provided in the Chapter Handbook and available electronically at www.phialpha.org. Please have an attorney or other professional review such Bylaws for any statutory or common law requirements of your state.)

7. Send the application and \$50 non-refundable application fee (made out to Phi Alpha Honor Society) to:

Phi Alpha Honor Society
Attn: Tammy Hamilton
East Tennessee State University
Box 70679
Johnson City, TN 37614

E-mail: phialphainfo@etsu.edu

Visit our website www.phialpha.org for more information.

XXVI. BYLAWS TEMPLATE

A. Phi Alpha Honor Society

This chapter Bylaws template may be used by the college chapter of Phi Alpha Honor Society. The provisions in this Bylaws template which are printed in standard type are requirements of the Phi Alpha Honor Society International Bylaws or the interim edicts and regulations of the Board of Directors and must be observed by each chapter and must be incorporated into each chapter's bylaws. The Bylaws template references the International Bylaws of Phi Alpha Honor Society: Roman numerals refer to an Article number and Arabic numbers following the Roman numerals indicate a specific Section relating to the subject so that you may reference such sections in the chapter's bylaws. The provisions of this Bylaws template which are printed in italic type are non-mandatory recommendations or comments for each chapter's consideration.

Each chapter shall thoroughly review the Bylaws template, construct bylaws for their chapter (with assistance of an attorney or other professional who may provide advice regarding legal requirements of bylaws within the city/county/state/province/country in which your chapter is located), and then introduce them for chapter discussion. The chapter members should decide what provisions should be adopted by the chapter (though mandatory provisions are required and may not be modified or altered by the chapter) and may also propose and adopt additional wording or Sections, providing such wording or Sections are not in conflict with the International Bylaws. If there is any conflict between the International Bylaws and the chapter's bylaws, the International Bylaws shall control.

B. Membership Rights

The Phi Alpha Board of Directors is fully aware that chapter advisers and officers are concerned about the level of participation of members in chapter activities. Requests for the establishment of international standards for attendance have been received. **The interest in increasing the effectiveness of chapters is fully understood, but chapters need to be aware that, in accordance with the Association of College Honor Societies (ACHS) eligibility standards, a compulsory attendance standard is not included in the criteria for membership and therefore cannot be enforced.** Any chapter that attempts to establish mandatory attendance standards could be vulnerable to legal action by members who feel that their membership rights have been violated. Phi Alpha is not responsible for, nor will it defend the chapter's position, if such a situation arises.

However, while compulsory standards for attendance do not exist, chapters do have the right to establish guidelines and processes that evaluate chapter advisor or officer effectiveness and procedures for dismissal from the role within the chapter as part of its criteria for evaluating effectiveness in or qualification for a particular role and/or office. Chapters must ensure a mechanism to afford due process to such actions.

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C. PHI ALPHA CHAPTER BYLAWS (suggested template)

1. Article I NAME AND LOCATION

The name of this chapter is the _____chapter of the Phi Alpha Honor Society (**VI-6.09**). This chapter is located at (name of college or university) in (city, state/territory, country).

2. Article II PURPOSES

The purpose of this chapter of Phi Alpha shall be to support the mission, policies and objectives of Phi Alpha Honor Society as set forth in the Phi Alpha Bylaws, and in all matters act in harmony with the principles and procedures of International Association and its Bylaws (**III, IV**):

- To recognize and promote scholastic achievement in social work undergraduate and graduate programs accredited, or in candidacy for accreditation, by the Council on Social Work Education.
- To improve and further the goals and objectives of social work in the community, state, nation and world by:
 - Encouraging objectivity and awareness of current developments and practices in the various fields of social work;
 - Developing active communication and positive working relations among schools of social work, undergraduate programs, professional social workers, and the general public;
 - Stimulating interest in preparation for a career in social work; and
 - Furthering research and study in social work.
- To recognize those professional social workers whose service and leadership are held in esteem.
- To provide scholarships for certain students to further their studies in the field of social work.
- To cooperate with other organizations that have similar goals and ideals to further the chapter's goals and mission.

3. Article III INSIGNIA

Section 1. Logo

The official logo of the society shall be the Phi Alpha Key (the "Logo"), which was approved by the National Honor Society Committee. The Logo shall be issued to and worn only by members of the society.

Section 2. Colors

Colors of the society shall be blue and gold as established by the National Honor Society Committee. Royal blue and light gold are preferred.

Section 3. Membership Certificates and Cards

Certificates of membership and membership cards shall be issued to all new members at the chapter's induction ceremony.

4. Article IV MEMBERSHIP

Section 1. Member Categories

This chapter shall consist of invited and initiated Collegiate Members of (name of college or university), together with such Alumni Members, Professional Members, Faculty Members, Advisor Members, and Honorary Members who meet the qualifications and, where required, have paid the one-time international fees as set forth in the National Bylaws (**V-5.01, V-5.02, V-5.04**).

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Section 2. Active Membership

Except for Honorary Members, all members in good standing are considered Active Members and have right to vote and serve on committees. Additionally, only Collegiate Members may hold office (**V-5.05**).

Section 3. Eligibility

Collegiate members shall be students enrolled in undergraduate, graduate or doctoral social work programs at the time of initiation and have been recommended for membership by their local chapter who paid international fees. Eligible students have completed 9 semester hours of required social work courses in their respective program or at least 37.5% of the total hours/credits required for the degree, whichever is later achieved, and rank in the top 35% of their class in the relevant Social Work program (**V-5.02**). It is here noted that class rank, number of hours completed, and GPA will only be considered in the current program in which the candidate is participating and not for other levels of programs in which the candidate formerly participated (i.e., if a candidate from a master's program is being evaluated, items from his or her undergraduate program cannot be considered in determining eligibility for membership.)

Section 4. Non-Discrimination and Anti-Hazing

Membership in the Society is open to qualified candidates, including persons with disability, without regard to age, color, gender, gender identity, gender expression, national origin, race, religion, and/or sexual orientation. No undue social pressure, hazing, bullying or harassment (collectively "Hazing") shall be used to ensure invitation or acceptance of membership by any Chapter or Chapter member(s). All Chapters and their members, regardless of classification, shall comply with the Chapter's university's non-discrimination and anti-hazing policies (**V-5.03**).

Section 5. Removal of Members from Local Chapter

Process to Suspend or Terminate Members from Chapter Affiliation

- Three or more members must bring the petition to the attention of the Advisor, which petition must contain grounds (which examples, if possible) for suspension or termination.
- The Advisor will review the charges in light of the Family Education Rights and Privacy Act (FERPA) to determine whether the issue is protected by FERPA.
- If the issue is protected by FERPA, the Advisor will address the issue by bringing the petition to the attention of the student. The member must have the opportunity to respond to the charges in writing and/or in person. The Advisor will have the sole discretion to determine if the student will be suspended or terminated from the chapter. If terminated or suspended, the student has the right to appeal the decision in writing to the International Headquarters within thirty (30) days of such suspension.
- If the issue is not protected by FERPA, the member in question must be sent an official letter, approved and signed by the Advisor, informing him or her that the chapter has begun the suspension or termination process and outlining the reasons for pursuing suspension or termination and the process to be followed. The member must have the opportunity to respond to the charges in writing and/or in person. The member must have the right to appeal his or her case before an impartial Review Committee.
- The impartial Review Committee should be comprised of the Chapter Advisor, two impartial student members, and one or two (to create an odd-numbered committee) faculty members who preferably are Society members. Individuals who participated in the impeachment request may

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not serve on this committee. As such, the impartial student members should be any two officers who were not part of the original petition. If there are not two qualifying officers, then the Advisor will appoint the necessary student member(s). This Committee must decide whether the charges are warranted to proceed with the suspension or termination process. If the Committee determines the proposed suspension or termination to be unwarranted, the process is terminated.

- A vote for suspension or termination by the Committee will pass with a three-fourths majority vote. Consideration must be based only on the documented criteria. The Committee's decision is final.
- Phi Alpha Headquarters must be sent an official letter stating that the Chapter has voted to suspend or terminate the member from local chapter affiliation or that the member has chosen to step down.
- The process for suspension or termination from Phi Alpha Honor Society are listed in the Bylaws. **(V.-5.07)**.
- Suspension from the university on disciplinary grounds; arrest for a felony, sexual assault, and/or other crime which could give other members of the Chapter a concern over their safety; and/or failure to timely pay chapter and/or International dues will automatically suspend the member's membership in the Chapter until such time as the charges can be investigated by the Advisor. The member will remain suspended, but will have the opportunity to respond to the charges in writing and/or in person within fifteen (15) days. The Advisor will have the sole discretion to determine if the student will be suspended or terminated from the Chapter. If terminated or suspended, the student has the right to appeal the decision in writing to the International Headquarters within thirty (30) days of such suspension or termination.
- Dismissal from the university on disciplinary grounds; conviction for a felony, sexual assault, and/or other crime which could give other members of the Chapter a concern over their safety; and/or failure to timely pay chapter and/or International dues on multiple occasions will automatically terminate the member's membership in the Chapter. The Chapter Advisor shall send the member a letter detailing his or her termination from the Chapter and the grounds for such termination. If terminated under this section, the student has the right to appeal the decision in writing to the International Headquarters within thirty (30) days of such termination, but must show written documentation that an error has been made in determining the grounds for termination.
- There is no further appeal after an appellate ruling from the International Office.
- If the member is suspended or terminated, then such member is automatically impeached from serving as an officer of the Chapter.
-

Section 6. International Membership Status Changes

Requests or needs for requalification of international membership status, resignation, suspension or termination of international membership will follow policies outlined in the International Bylaws. **(V-5.02, V-5.06, V-5.07)**.

Section 7. Impact of Membership Resignation or Termination

If a member resigns or his or her membership is otherwise terminated hereunder ("Terminated Member"), then such Terminated Member is deemed to have resigned from all officer and/or board positions and their membership in Phi Alpha Honor Society International is revoked. (V-5.06.)

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5. Article V DUES

Section 1. International dues

Each active Member other than Advisor (Collegiate, Alumni, Professional, or Faculty) is required to have submitted the international dues to the Society through (name of chapter) prior to be declared a Member of Phi Alpha or having any privileges of such membership. Advisor Members' international dues are waived, but if such Advisor Member has already paid the international dues prior to becoming an Advisor Member, then no refund will be issued. Since Honorary Members do not vote and their membership is honorary, there are no dues assessed to Honorary Members. If an Honorary Member desires to become an active member, said Honorary Member must follow the process outlined in the International Bylaws, including payment of the appropriate international and local dues for such membership in the same manner as any other person apply for active membership of that particular membership classification (**V-5.02**).

Section 2. Chapter dues

Each local chapter determines the amount of local dues, if any, that each membership class shall pay to said local chapter (**VI-6.08**). *Annual chapter dues shall be established in accordance with chapter needs by action of the Executive Committee and a three-fourths vote of the chapter membership present.*

Section 3. Special fees

Special fees may be levied by the Executive Committee with a three-fourths vote of the chapter membership present.

6. Article VI OFFICERS AND ADVISORS

Section 1. Required Collegiate Officers

The officers of each chapter shall consist of a President, a Vice-President, and a Secretary-Treasurer, which shall be Collegiate Members (whether undergraduate, graduate or doctoral students) (**VI-6.06a**) *to be elected by a majority vote of the membership, though initial officers may be appointed by the Chapter Advisor until such time as a new election is held in accordance with these Bylaws.*

Section 2. Additional Officers

Additional officers may be added to meet the needs of the individual chapters (**VI-6.06b**). *The Chapter hereby designates the following additional officers and the standard duties of each: (provide listing.)*

Section 3. Qualifications

The officers of the chapter must be active members who have maintained the scholarship requirements for initiation. The officers of a collegiate chapter must be Collegiate Members (**VI-6.06c**).

Section 4. Officer Responsibilities

It is important to articulate the responsibilities of each officer in order for everyone to understand what is to be expected and so the officers can be successful in their respective roles. We suggest you consider any/all of the responsibilities listed in the Chapter Handbook under Collegiate Officers and Advisors.

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PRESIDENT/VICE PRESIDENT

As chapter president or vice president, you oversee the Chapter's operations. The vice-president is required to step into the president's role in the absence of the president or to take on such other responsibilities as the Chapter may direct. Responsibilities include:

- *Working with your advisor and other officers, develop a written plan of action for the chapter's activities for the year, including at least one activity that promotes scholarship, community service, and leadership development.*
- *Call chapter meetings and establish a meeting schedule.*
- *Preside fairly at chapter meetings.*
- *Be respectful of time, but let everyone participate.*
- *Facilitate chapter goal-setting.*
- *Meet with other officers regularly.*
- *Update administrators on chapter activities.*
- *Have members complete the Liability Waiver for each event*
- *Offer chapter assistance to the college/university.*
- *Be familiar with chapter and International Bylaws and policies.*
- *Preside over the induction ceremony.*
- *Ensure transition and orientation of new officers.*
- *Ensure your chapter is registered with your school's student affairs/student organizations office.*
- *Use effective event planning*
- *Learn about, promote, and apply for Phi Alpha service awards and/or grants*
- *Ensure that your chapter has all required collegiate officers.*
- *Submit the Chapter Year-End Report to the International Office on or before May 31st.*
- *Ensure that the International Office has your most current Bylaws.*

SECRETARY

As secretary of your Phi Alpha chapter, you will serve on your chapter's executive board. Responsibilities include:

- *Keep all Minutes, correspondence and paperwork.*
- *Record Minutes of each meeting and distribute copies.*
- *Keep accurate roll of members' attendance at all functions.*
- *Notify members of place and time of meetings.*
- *Notify new members of their selection after approval.*
- *Notify new members of their orientation date and time.*
- *Orient and turn over all materials to your successor.*
- *Distribute/file minutes for all members and the advisor. Distribute through campus mail or email and file electronically such that all members may access them virtually.*
- *Contribute, as needed, to the Chapter Year-End Report.*

TREASURER

As treasurer of your Phi Alpha chapter, you will serve on your chapter's executive board and give monthly attention to the details of bookkeeping and money management. Responsibilities include:

- *Serve as a co-signatory along with Advisor on chapter bank accounts.*
- *Oversee or serve on fundraising committee.*
- *Establish a chapter budget to be approved upon by the chapter.*
- *Hold at least one fundraising event.*
- *Provide regular financial reports or updates to chapter.*

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- *Collect new and continuing membership fees.*
- *Execute end-of-year audit of chapter financial records.*
- *Orient and turn over all materials to your successor.*
- *Contribute, as needed, to the Chapter Year-End Report.*

Section 5. Vacancies

If an officer has resigned or is disqualified, the office shall be filled by a special election of the chapter, which shall be held as promptly as is feasible. The executive committee is empowered to fill vacancies in any elective office until a special election is held. The person so elected shall hold office for the remainder of the term.

Section 6. Mentors

The chapter may have Alumni, Professional, Faculty, or Honorary Members who serve as mentors for the chapter. The Mentor role is advisory only. The officers must conduct all chapter business (**VI-6.06d**).

Section 7. Chapter Advisor

Each chapter is required to have an advisor who is a member of the faculty or has a professional designation (e.g., Director of Field Instruction) within the university. This Advisor should be affiliated with the department that oversees a social work program at that university or college and must be an Advisor Member of the Society (**VI-6.06e**). Responsibilities include:

- Assist your student officer to develop a written plan of action for the chapter's activities for the upcoming year, including at least one activity that promotes scholarship, community service, and leadership development.
- Attend executive board and Chapter meetings.
- Attend all new member selection meetings.
- Assist in a thorough orientation for new members.
- Encourage use of parliamentary procedure.
- Assist in chapter programming.
- Review the Chapter budget.
- Serve as a co-signatory on Chapter bank accounts.
- Communicate campus policies and procedures.
- Serve as a sounding board for Chapter officers.
- Aid in preserving the continuity of the Chapter.
- Be generally available to assist the organization.
- Aid chapters in identifying future advisors.
- Aid in registering the Chapter as a student organization.
- Remind the Chapter of deadlines for reports.
- Assist the Chapter in finding funding sources.
- Encourage the use of campus and national resources.
- Learn about, promote, and apply for Phi Alpha service awards and/or grants
- Oversee the induction of new members
- Ensure that the Chapter Self-Assessment is completed timely.

Section 8. Chapter Board of Directors and Officers

If the Chapter is also a state recognized nonprofit corporation, then said Chapter will adhere to

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state corporation requirements regarding a local board of directors and/or required local officers, if in addition to the ones required herein (**VI-6.06f**).

Section 9. Removal of Officers or Advisor

Process to Impeach an Officer

- Three or more members must bring the petition to the attention of the Advisor.
- The officer in question must be sent an official letter, approved and signed by the Advisor, informing him or her that the chapter has begun the impeachment process and outlining the reasons for pursuing impeachment and the process to be followed.
- The officer must have the opportunity to respond to the charges in writing and/or in person. The officer must have the right to appeal his or her case before an impartial Review Committee.
- The impartial Review Committee should be comprised of the Chapter Advisor, two impartial student members, and one or two (to create an odd-numbered committee) faculty members who preferably are Society members. Individuals who participated in the impeachment request may not serve on this committee. As such, the impartial student members should be any two officers who were not part of the original petition. If there are not two qualifying officers, then the Advisor will appoint the necessary student member(s). This Committee must decide whether the charges are warranted to proceed with the impeachment process. If the Committee determines the proposed impeachment to be unwarranted, the process is terminated.
- A vote for impeachment by the Review Committee will pass with a three-fourths majority vote. Consideration must be based only on the documented criteria. The Review Committee's decision is final.
- Headquarters must be sent an official letter stating that the chapter has voted to impeach the officer or that the officer has chosen to step down. This letter also must include the name of the member who will fill the vacant position.
- The impeached officer will remain a member of the Chapter provided not otherwise suspended or terminated under other provisions of these Bylaws.
- An officer whose membership in the Chapter has been terminated is automatically impeached from his or her office without need for this procedure.
- If an officer is impeached, then the Chapter will hold an election for replacement of such officer at the next available Chapter meeting. If the President of the Chapter is impeached, then the Vice-President shall become President and the Chapter will elect a new Vice-President.
- Any impeached officer is not eligible to run for a Chapter office in the year after that in which he or she was impeached.

Process to Remove an Advisor

- Chapter officers and/or institution administrators may bring situations to the attention of the International Phi Alpha Executive Director and Board of Directors that might warrant the removal of an Advisor.
- Sufficient cause for removal may result from violation of these Bylaws or any lawful rule or practice adopted by the Society, failure to reasonably complete the duties as assigned by these Bylaws, or other conduct deemed by the Board of Directors to be prejudicial to the best interests of the Chapter or Society. A statement of the charges for removal shall be sent to Phi Alpha Headquarters. Phi Alpha will send the charges to the Advisor by registered mail, accompanied by notice of the time and place of the meeting at which the charges are to be considered. At least

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thirty days' notice shall be given, and the advisor shall have the opportunity to present any defense to such charges before action is taken by the Phi Alpha Board of Directors. The Board may adopt such rules as may be necessary to assure due process to the Advisor.

- The decision for removal shall be by a two-thirds vote of the Phi Alpha Board of Directors.
- The removed Advisor will remain a member of Phi Alpha provided not otherwise suspended or terminated under other provisions of these Bylaws or the International Bylaws. Said Advisor may apply for acceptance to another chapter of Phi Alpha if he or she no longer desires, or the Chapter no longer desires, said removed Advisor to be affiliated with the Chapter.
- After an Advisor is removed pursuant to this process, the head of the Department of Social Work for the college or university will appoint a different person in the Social Work department to serve as Interim Advisor until a qualified Advisor is able to be appointed.

Officer or Advisor Resignation

- At any time, an officer or Advisor may resign by providing written notice of such resignation to the current Advisor, President, or Secretary, as long as such officer is not himself or herself.
- Such resignation shall be effective when delivered unless a delayed effective date is listed in such written notice of resignation.
- If an Advisor resigns, the head of the Department of Social Work for the college or university will appoint a different person in the Social Work department to serve as Interim Advisor until a qualified Advisor is able to be appointed.
- If an officer resigns, the Chapter will hold an election for replacement of such officer at the next available Chapter meeting. If the President of the Chapter resigns, then the Vice-President shall become President and the Chapter will elect a new Vice-President.

7. Article VII MEMBERSHIP PRIVILEGES AND RESPONSIBILITIES

Section 1. Liability Waiver

In consideration of Member becoming a Member of Phi Alpha and (local chapter name), said Member acknowledges the risks of any chapter activities and releases Phi Alpha Honor Society, the local chapter, the university, and any other associated parties, as described in the International Bylaws (**V-5.08**).

Section 2. Voting.

Only Active Members are eligible to vote on matters in their local Chapter. Said Member must be a member of said local chapter to be eligible to vote in that Chapter. Each Member may only vote as one type of Member at any time. Each Member may only vote in the local chapter in which there are officially affiliated under their current classification of membership in said local chapter. Each Member is entitled to one vote upon each matter submitted to a vote for which there is not a conflict of interest for said Member. The specific voting method must be derived from the guidelines described in the International Bylaws (**V-5.09**). As such, this chapter will allow Members to vote in the following way(s): (*describe*

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method(s) to be used, but make sure that each voting method provides sufficient checks and balances to prevent duplicate voting).

Section 3. Chapter Affiliation

Each Member must be affiliated with a local chapter. The default chapter to which a Member belongs and is eligible to vote is the collegiate chapter where the Member was first granted membership. If a Member moves to an area where a local chapter is within a reasonable distance of said Member's primary workplace and/or residence, then said Member may transfer chapters to the new local chapter following the procedures described in the International Bylaws (**V-5.11**).

8. Article VIII CHAPTER ORGANIZATION AND PROCEDURES

Section 1. Meetings

Each chapter shall determine the number of meetings to be held during the year and report the same on the Chapter Year-End Report in a format and containing the information required by Phi Alpha. Each chapter is required to have a minimum of one meeting a year to hold elections (**VI-6.05**).

Section 2. Committees

Standing Committees may be appointed by the President with the approval of the Executive Committee. Special committees may be appointed by the President.

Section 3. Elections

Election of officers shall be held once each year at a time and place to be designated in the notice of meeting provided to the Members (**VI-6.03**).

Section 4. Calendar Year

The Chapter year shall begin on July 1 and end on June 30.

Section 5. Record-keeping and Reports

The Chapter shall maintain and file adequate and accurate records and reports of its membership activities and finances (**VI-6.03, VI-6.05**). Such records shall be kept in such a way as to serve as a permanent and historical record. Such reports may be requested by the International Office at any time and must be provided in a reasonably timely fashion.

Section 6. Inductions

Procedure for induction of members shall be:

- Each prospective member shall receive a written invitation to membership from the chapter, shall complete registration information, and submit membership fee to the Chapter.
- All Chapters must provide the International Office a list of proposed members before induction, as well as their qualifications to become a member of the Chapter.
- One payment from the Chapter or the college to cover all registration fees for the induction be paid to Phi Alpha prior to the induction.
- An official membership card and membership certificate in the name of each new member shall be forwarded to the Chapter for proper distribution.

- A copy of the induction ceremony provided by Phi Alpha shall be used by the Chapter to induct members into Phi Alpha.
- Membership shall be complete when the registration information has been filed at the International Office, the international membership fee has been paid, the induction ceremony has been completed, and the membership card and certificate issued.

Section 7. Acceptance of Members from Other Chapters

- The Chapter may accept Phi Alpha members from other chapters if such member (i) transferred or otherwise changed schools after becoming a Phi Alpha member, and (ii) was in good standing with said former chapter.
- The Chapter may also accept Phi Alpha member whose chapter was closed at his or her college and/or university after such person became a Phi Alpha member.
- The transfer Phi Alpha member may be required to pay Chapter dues, if any, but is not required to pay the Phi Alpha membership fee.
- Similarly, if a member of this Chapter transfers to another school or this Chapter closes, then said Chapter member may petition such other Phi Alpha chapter for membership in said chapter.
- While acceptance of a Phi Alpha member from another school is strictly discretionary to the Chapter, Phi Alpha Honor Society encourages its chapters to provide chapter membership opportunities to members in good standing so they have the opportunity to participate in Phi Alpha Honor Society chapter activities and programs.
- All transfers of Phi Alpha membership between chapters should be reported to the International office and be in compliance with the Phi Alpha Honor Society International Bylaws.
- *Any additional requirements your chapter may have related to transfer of membership between chapters, but any such requirements should be in compliance with the Phi Alpha Honor Society International Bylaws.*

9. Article IX AMENDMENTS

10. Article X RULES OF ORDER

Roberts Rules of Order Revised shall be the authority for this chapter in matters of procedure not specified above or otherwise provided by Phi Alpha.

Enacted and adopted by the membership of the Chapter this _____ day of _____ in the year _____.

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