

Phi Eta Sigma

National Honor Society

Handbook for Chapter Advisers



REVISED 2018

Overview of the Phi Eta Sigma National Honor Society, Inc.

Phi Eta Sigma Honor Society is a nonprofit chapter-based membership organization with more than 1.2 million historical members, and more than 220 active (378 total) chapters located at colleges and universities across the United States. An active Phi Eta Sigma chapter promotes academic excellence and provides opportunities for personal growth, leadership development, and campus and community service.

Induction into Phi Eta Sigma is earned by outstanding academic achievement in first year studies and lasts for a lifetime. The Society's mission is to encourage and reward academic excellence among freshmen in institutions of higher learning.

Phi Eta Sigma membership is by chapter invitation for eligible first-year students who attend class full time, achieve a cumulative GPA of at least 3.5, and rank in the upper 20 percent of their freshman class. Lifetime national membership dues are affordable at \$35.

A Phi Eta Sigma Adviser educates new officers and other chapter members, helping them to identify and meet the chapter's goals in accordance with the Phi Eta Sigma Constitution and Laws. The Phi Eta Sigma adviser supervises to the extent they can remind officers of deadlines and duties. The adviser also:

- Encourages and assists students to assume leadership roles in the local chapter and to apply for national and local Phi Eta Sigma scholarships
- Guides chapter leaders and activities. The adviser may find it desirable to interview prospective chapter officers in order to impress on them the responsibilities connected with their office.
 - Advises chapter officers to make use of available marketing and public relations resources
 - Makes recommendations to officers regarding financial decisions
 - Aids chapter officers in identifying faculty and staff who can provide academic venues and workshops for members and/or chapter leaders
- Collaborates with campus resources to obtain eligible lists of students
- Networks with campus offices to keep apprised of federal regulations and compliance therein, i.e. FERPA

How-To Quick Guide

Invite/Induct New Members

Obtain a list of eligible members from your registrar. The most efficient invitation method is to opt-in to use our online registration system, My Honor Society. See the MHS User Manual for details. Contact the national office for an induction ceremony booklet.

Update Chapter Contact Information

Visit the My Honor Society website and login to update your profile at phietasigma.myhonorsociety.com, or call the national office at 270-745-6540.

Submit the Chapter Annual Report

Upload these via the adviser login on our website or email to phi.eta.sigma@wku.edu.

Find the Constitution & Laws

Download a pdf here:
<http://www.phietasigma.org/constitution>.
Contact the national office for a printed version.

Roster of Chapter Membership

Chapters that opt to use My Honor Society can login to view their member database.

Chapter & Region Directory

Visit our website:
<http://www.phietasigma.org/chapters>

Need Something Else?

You can communicate with the national office in several ways:

Phone: (270) 745-6540

Fax: (270) 745-3893

E-mail: Phi.Eta.Sigma@WKU.edu

Mailing address:

Phi Eta Sigma National Honor Society, Inc.
Western Kentucky University
Grise Hall 525
1906 College Heights Boulevard #11062
Bowling Green, KY 42101-1062

National website:

<http://www.phietasigma.org/>

LinkedIn:

<http://www.linkedin.com/company/phi-eta-sigma-national-honor-society-inc/>

Facebook:

<https://www.facebook.com/pages/Phi-Eta-Sigma/223748430986110>

Twitter:

<https://twitter.com/PhiEtaSigmaNatl>

National Office Staff

Elaine Powell, **Executive Director**

Ria Butts, **Executive Assistant**

Beth Britton, **Communications & Media Specialist**

National Executive Committee

<http://www.phietasigma.org/leadership>

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Phi Eta Sigma National Office

The Phi Eta Sigma national office exists to support and serve the local chapters. The office is located on the campus of Western Kentucky University in Bowling Green, Kentucky. National office hours are Monday through Friday 8 a.m. to 4 p.m. central time. See the How-To Quick Guide above for all the ways you can communicate with the national office. The national office website, <http://www.phietasigma.org>, is a resource for answers to FAQ's and provides helpful information for advisers.

In order to effectively serve the chapter adviser, the national office must know the needs of the local chapters with enough lead time to provide them with all services.

- The national office needs to have the name, mailing/shipping address(es), phone number, and email address of the chapter adviser. All correspondence and orders will be sent to the **office address** of the chapter adviser. Orders and supplies will always be sent to your campus address, not to campus or home addresses of the student officers.
- The national office from time to time will send communications requiring response to the chapter. It is very helpful for the chapter to use the forms provided for these responses. These mailings include:
 - chapter annual reports,
 - *Forum* order form and chapter activity sheet,
 - convention registration forms,
 - nomination form for national Executive Committee positions, and
 - scholarship applications.
- One of the most important communications the adviser will have with the national office is the annual submission of the chapter's *Forum* information. Briefly summarize the high points in the chapter's past year and provide high resolution digital photographs of chapter activities and events. Throughout the year, additional information and photographs may be submitted for possible inclusion on the Phi Eta Sigma website, social media pages, or the *Forum* magazine.
- The national office publishes *Pathways*, which describes what the adviser needs to do for submitting electronic memberships to the national office using a Microsoft Excel file. The national office prefers that chapters submit membership records using one of the two electronic formats, either by Excel file or My Honor Society online registration.
- When the adviser communicates with the national office it is imperative to include in correspondence the chapter institution name and, if possible, the chapter code assigned to each chapter by the national office.

- If the adviser submits membership information to the national office electronically, the chapter should follow the submission with a payment by check or credit card in the amount owed. Credit card payments are accepted by telephone or through the Adviser Resources section of the national website. The balance owed by your chapter will be shown on your invoice or credit memo sent with the membership certificates. The national office staff will be glad to clarify this balance for you. The national office expects a lump sum payment from the chapter for all its new member dues (unless the new members have paid fees online through My Honor Society).
- The national office needs to know when there is a change in chapter adviser. This is crucial to the continued function of the chapter. If you are thinking of leaving the institution or taking a short leave of absence, contact the national office to provide the name of another faculty or staff member who will serve as adviser in your absence and carry on the work that you established.

Compliance with IRS Regulations

As a tax-exempt organization, Phi Eta Sigma Honor Society is required to file Form 990 each year with the Internal Revenue Service. Recent IRS guidelines require detailed reporting by tax-exempt organizations and their subsidiaries. Therefore, each Phi Eta Sigma chapter is required to file with the IRS either as a separate tax-exempt entity or as part of a group exemption.

Phi Eta Sigma requires each chapter to indicate how it meets IRS regulations for filing an annual tax return: by filing a Form 990, 990-N, or 990-EZ as a separate tax-exempt entity; by filing as part of a group exemption through the university or another organization (such as Alpha Lambda Delta); or by authorizing Phi Eta Sigma to include the chapter in its group exemption filing.

Chapters that authorize Phi Eta Sigma to file the annual tax return on their behalf are required to obtain a federal Employer Identification Number (EIN) and submit an annual report to the national office showing financial data such as income from membership fees and fundraisers, operating expenses, scholarships awarded, and beginning and ending bank balances. Failure to do so will result in the chapter being removed from the group exemption filing, and the chapter is responsible for its own tax return filing and compliance with IRS requirements.

PLEASE NOTE: If the chapter does not report its EIN and financial summary to the national office, Phi Eta Sigma national administration assumes the chapter will file on its own or as part of another group exemption. The Phi Eta Sigma national office is not responsible should the IRS request information regarding the chapter's finances.

Materials and Supplies

The national office will send all correspondence and materials to the adviser at their designated office address. Examples of mailings or shipments include keys, certificates, invoices for membership fees and items purchased, *Forum* magazines (the national annual publication), honor cords and other merchandise, order forms, scholarship forms, notices of convention, and brochures and other supplies. Common items needed to efficiently provide oversight for the chapter include:

- Membership files (one file by induction class and another for all members, both to be kept comprehensive and current); if feasible, membership records should be kept in an electronic spreadsheet or database where they can be sorted and searched by name or class. Additional information in these records may include term/year qualified, induction date, last term/year enrolled, contact information (particularly email), emergency contact information, and other information useful in identifying groups of members and which may be useful for the chapter in the future.
- Copies of the national Constitution and Laws, as well as the chapter constitution or bylaws if applicable
- The chapter history and/or scrapbook, as well as the chapter roll book
- The induction ceremony brochures and any program covers, if your chapter has ordered them from the national office
- The official membership slips (for back-up) if new member information is not submitted electronically to the national office
- The academic robes, if used at induction
- The framed charter and the framed crest
- Membership keys (charms) and tie tacs (pins), including a few replacements
- Sample letters of invitation
- Chapter stationery
- Correspondence files, of campus correspondence, as well as national. In addition, email correspondence should be saved and filed electronically for historical purposes.
- Extra copies of the *Forum* (a complete file of the *Forum* should be placed in the college library)
- Any prize cups, plaques, or other awards already awarded or to be awarded

In short, everything belonging to or pertaining to the chapter, with the exception of its money and the library volumes of the *Forum*, should be kept in the chapter adviser's office. At some institutions, Phi Eta Sigma has its own office.

If it is necessary to store items in additional spaces, the adviser should keep a log of items and their location.

Administrative support is helpful. This support can be some level from the campus or within the chapter itself.

New Member Recruitment

New member recruitment is essential for Phi Eta Sigma chapters to continue to thrive and contribute to their campuses. Arrangements to access information about students who qualify need to be made well in advance of grades posting. Advisers need to work collaboratively with the necessary departments (typically the registrar) to obtain a list of eligible students and their contact information. A student is eligible if they earned the requisite academic grade point average during the first quarter, second quarter, or third quarter, or for the first or second semester and she or he remains in the top 20 percent of his or her respective class. In addition to names and addresses, the adviser may want to obtain qualified students' email addresses, class, major, high school, or other information that may be helpful to the chapter. As soon as final grades for the qualifying term are posted, the adviser should obtain the needed information for the students who are now eligible for membership.

Formal letters on the chapter's Phi Eta Sigma stationery, inviting eligible students into membership in Phi Eta Sigma should be generated and sent. Most chapters send these letters to the students' parents. In addition to highlighting benefits of membership, this letter of invitation should detail how to join and/or how to obtain further information, such as attending a scheduled event, going to a particular location (i.e., the adviser's office), and/or visiting a specified website. The fee, important dates, and time that membership forms will be accepted should also be included. A membership form for enclosure in your letter is supplied by the national office upon request at no charge. The chapter president and chapter adviser should sign these letters to give them more official character. Email can be used as an alternative, or in addition to the letter of invitation. If the chapter opts to send these out via email, they should scan signatures in the email as well.

A free informational brochure is available from the national office for enclosure with your letter, or your chapter may prepare a similar brochure adding details on your chapter. The chapter can effectively increase the number of inductees with follow-up contacts of those not responding to the original letter or email.

The chapter officers and/or adviser will obtain from each eligible student who has chosen to join Phi Eta Sigma the required contact information and fee for membership. The membership fee could vary from campus to campus. The national fee is currently \$35 (as of 2019), which is utilized for, but not limited to: the certificate, key or tie tac, *Forum*, and the national office services. Membership fees are also used to cover convention expenses and to support Phi Eta Sigma's Founder Fund Scholarships. The fee is due from each new member. (If honorary members are being inducted, the chapter covers the fees for those individuals.)

Most chapters add a local fee to assist in paying for induction and other activities. If chapters accept cash, a receipt for the fee should be provided. Some chapters develop their own membership form requesting similar information as the national office form and any additional information that may be needed for the chapter or required by the institution. For example,

Syracuse University requires all recognized student organizations to have emergency contact information for all members.

Chapters may opt-in to using our online registration system, My Honor Society, for membership enrollment. Advantages include easy email template invitations, an online membership database, a format for messaging members, and capability for members to pay dues with a credit card. Contact the national office to setup a My Honor Society account.

Certificates, keys, and tie tacs are ordered from the national office, using the official order form or by email. NO INDUCTION SHOULD BE HELD WITHOUT PRESENTATION OF CERTIFICATES AND KEYS (OR TIE TACS). The national office will prepare certificates from the electronic membership file and will ship the jewelry and certificates to the adviser's office promptly. Membership files must be submitted to the national office at least two weeks in advance of the induction ceremony to allow time for certificate preparation and shipping. Please refer to *Pathways* in the Appendix for a sample of the requirements for submitting membership information via spreadsheet.

The national office encourages advisers to accept late members at the chapter's discretion. Attendance at induction is not required. You may want to print a mock certificate to present at the induction ceremony if a member joins after you have placed your initial induction order and before the ceremony. To order materials for these members, it is best to wait and group them together in one additional order after the induction. If your chapter has some late inductees, the national office staff makes every effort to send their certificates and keys to you as quickly as possible.

Induction Preparation

The adviser encourages the chapter president to call a meeting of the chapter officers to prepare for induction of new members. Induction may be held in any academic term, and some chapters hold induction in both the spring and fall semesters. This is the decision of each chapter's leadership. On some campuses the leadership coordinates induction ceremony for it to occur on Family/Parents Weekend so that parents can more easily attend.

A dignified and meaningful induction of new members at least once each year is the duty of the adviser and officers. The adviser should arrange a practice induction, which should take place at the location of the actual induction, perhaps just prior to the actual induction. Special attention should be given to the reading of the parts and the movements during the induction ceremony as specified in the (induction ceremony booklet) ritual.

The members usually take such a program very seriously and can be relied on to accept assignments individually or collectively and to carry them out conscientiously. The adviser can turn this meeting over to the members and sit back and watch them function smoothly but should, as always, be available to assist as needed.

There is much to be done in preparing for an induction. After the adviser and officers have completed recruitment planning (discussed previously), the induction checklist will include:

- Reserve appropriate space for the induction ceremony and post-ceremony celebration (reception or banquet).
- The chapter officers should agree upon honorary members to be invited, if any are desired (see Article IX, Section 3, of the Constitution and Laws), and prepare invitations for them also.
- The speaker could be one of the newly inducted honorary members, a successful alumnus, a highly regarded faculty member, the college president, or another well-regarded member of the college community. Always plan on thanking the speaker and consider presenting them with a small token of appreciation. A few Phi Eta Sigma related items are available for purchase online at <http://www.kenjernigan.com/Phi-Eta-Sigma/>. Or you may purchase another gift more suitable for your chapter, speaker and/or budget.
- If honorary members will be in attendance, plan for how these individuals and/or other special guests will be recognized during the ceremony.
- Arrange for catering for the celebration after the ceremony, music before and/or after the ceremony, photographer(s)/videographer(s), and training for volunteers who will assist with set up, check in, ushering, and cleanup.
- Arrange for printed programs. Banquet program covers (4" x 5") imprinted with the Society crest are available from the national office at cost, but should be ordered well in advance if local printing is to be done.
- Create and send induction ceremony invitations to new inductees, upper-class actives, faculty members, previous honorary members, and/or others your chapter wishes to invite.
- Arrange for the remainder of the ceremony details including, but not limited to: additional personnel to greet, campus security, and custodial services as necessary.
- Items which should be gathered in preparation for the induction include:
 - Keys or tie tacs
 - Certificates
 - Honor cords (if applicable)
 - The crest and necessary paraphernalia (such as an easel for display and a pointer for identifying areas within the crest)

- Induction ceremony booklets (available from the national office)
 - Induction ceremony scripts for the head table and list of names of the inductees
 - Chapter roll book – chapters can purchase a nice bound book to keep from year to year for the new members to sign each year at induction or may create an attractive list of inductees for this purpose so that only the names of students in attendance are called
 - Pens or fine markers
 - Tablecloths to cover the tables at induction
 - Basket or container to display the tie tacs/pins. Note that these come wrapped in plastic for protection.
 - Candles and matches or lighter for ceremony (optional). Some chapters have a center candle from which other candles are lit.
 - Copies of the *Forum*
 - Induction ceremony programs for all inductees and guests
 - Gift for guest speaker
 - Water for head table or podium
 - Podium with microphone for speaker
 - Plaques or certificates for any special awards, scholarships, or other recognitions to be given during the ceremony
- Review the Induction Ceremony Booklet (available upon request from the national office). Assign the officers to each section.
 - Determine if certificates and jewelry will be handed out during the ceremony, or if inductees will pick them up at a designated table after the ceremony. Have inductees arrive early and process in alphabetically to designated seating if certificates are to be distributed during the ceremony.
 - Identify who will be reading the names. If necessary, check with the inductees as they arrive and ask for help to pronounce all their names correctly. Some chapters ask the inductees to introduce themselves and tell their hometown and major to the audience when they come forward to receive materials and/or sign the roll.
 - Identify individuals in charge of returning all chapter belongings to the chapter's storage area/office. If possible, arrange for this to be done after the celebratory event that follows the induction so that chapter officers and volunteers are able to celebrate with families, friends, and new members. If returning chapter supplies must be accomplished immediately after the ceremony, assign a small group to handle this and join the others shortly thereafter.
 - Some families, friends, and new members may choose to stay at the induction site to take additional pictures.

- Keep a detailed record (spreadsheet/calendar/document) of steps taken and their time frame to assist next year's officers. Document evaluations obtained from officers, volunteers, and attendees to add to this record.

Some other ideas to consider:

- Provide each inductee a card to serve both as a banquet/reception (or luncheon) ticket and as a reminder of the date, hour, and place of the induction activities.
- Have lists of names of inductees and publicity stories regarding approaching induction placed in the college or university newspaper. This publicity should include membership eligibility requirements and a statement that Phi Eta Sigma is open to both men and women. This will provide for the inadvertent omission of an invitation to an eligible student. Please see the attached news release template.
- Have the photographer ready at an appointed time and place just after the induction to take a group photo for the college or university yearbook and for members who wish to order copies.
- If you elect officers at induction, have plenty of ballots ready for the election of officers at the close of the program.
- Arrange for a videographer to record your ceremony and make arrangements to upload it so that new inductees and their family members who are unable to attend the ceremony are able to view it.
- Arrange for the awarding of any cups, plaques, or awards the chapter may give.
- Recognize national and local scholarship winner(s).
- Provide a display table of various scrapbooks, previous *Forums* (possibly marked where your institution has been mentioned or has a picture inside).

Chapter Officers

Many chapters have found great success in electing officers from the junior class. This gives students an opportunity to prove their interest and aptitude while serving as active sophomore members. The senior adviser is often the past president or other officer of the Society. This will ensure continuity of the program and experienced leadership. Each chapter may choose its own process for election/selection of officers and administrative positions.

The position and duties of the chapter officers are those generally accepted and outlined in the Society's Constitution and Laws and *Robert's Rules of Order*.

Some chapters may choose to elect officers at induction. Some chapters hold a separate meeting at a later date at which the election is held, the photo is taken, and the certificates are distributed. With large chapters, however, it is difficult to get full attendance at a subsequent chapter meeting, and the induction may be the one occasion at which you will have full attendance.

Many chapters are required to have their own constitution for their campus in order to be recognized as a student organization. Their constitution will indicate how they select/elect officers.

Founders Fund Scholarships

The adviser has the opportunity to encourage one or more student leaders to apply for one of Phi Eta Sigma's Founders Fund Scholarships. Depending on the number of members inducted in the previous academic year, the chapter may nominate one or more undergraduate applicants. There is no limit on the number of graduate applicants you may submit; members interested in graduate scholarships may submit their applications directly to the national office if they wish.

Details on each of the scholarships may be found on the Society website. The Founders Fund Scholarships require a minimum 3.5 GPA (on a 4.0 scale). In the 2014 awarding year, the graduate recipients' GPAs averaged 3.832 and the undergraduate awardees' GPAs averaged 3.816. The Founders Fund Scholarship application requires standard information, plus additional essay questions that applicants should expand upon. There is no limit to the number of words or pages. Resumes and lists are discouraged; answers are preferred in essay form.

The National Scholarship Committee encourages every member to consider applying for a Founders Fund Scholarship. Whether the adviser reviews the application to guide applicants in fine-tuning it or writes a recommendation for the member to submit with the application, this is an area in which the adviser can be of tremendous assistance to member applicants.

Chapter Activities

Phi Eta Sigma makes no requirement regarding chapter activities. Each chapter is at liberty to formulate and carry out its own program of activities as it may see fit. Article X, Section 2 of the Constitution and Laws provides: "Active chapters shall have the power to adopt by-laws for the local government and for the regulation and control of their revenues and expenses, provided that no by-law shall be, in legal effect, in conflict with the Constitution or any enactment of the society." Further, Article X, Section 8 states: "Every chapter is encouraged to sponsor and promote activities of an academic nature as well as social and service-oriented projects. These activities may encompass both the campus and surrounding communities."

This provision is judicious because our chapters vary in size and complexity. In some cases, there is much social life and abundance of student activities on the campus; there, Phi Eta Sigma may choose to achieve distinction by focusing on recruiting and inducting new members

rather than social activities. Other chapters choose to make a useful and welcome contribution to the academic, cultural, and social well-being of the campus while allowing members to build their knowledge, skills, and abilities. Each chapter can best judge its own institutional opportunities and obligations and so has entire freedom of action. Regardless of the volume of activities and events your chapter engages in, these should enhance, rather than conflict with, the chapter's efforts to recruit and induct new members.

Creating traditional chapter events, activities, and philanthropies, and improving upon them slightly each year is much easier than starting from scratch with each new group of chapter officers. Convention attendees often glean many ideas for chapter activities by talking with attendees from other chapters or by viewing chapter displays. Officers and advisers looking for helpful and worthwhile ideas should review copies of the *Forum* to see what other chapters have done. Some frequently listed activities are:

- Participating in summer orientation programs
- Providing tutoring services to fellow students
- Presenting plaques, cups, or other awards to groups or individuals with best scholastic records
- Establishing and conducting faculty-student forums
- Making a welcome video for entering freshmen
- Administering faculty evaluations
- Presenting books to the library to honor particular faculty members
- Tutoring outside college, e.g. in local jails and schools
- Presenting teacher-of-the-month awards
- Ushering for lectures, academic symposiums, and other campus events or concerts
- Participating as a group in campus intramural athletics
- Working with other groups on community or campus improvement projects
- Acting as liaison for student government in appropriate campus activities
- Contacting eligible members of Phi Eta Sigma about applying for Founders Fund Scholarships
- Meeting with government officials visiting campus for low-level lobbying
- Administering College Bowl competition
- Adopting and participating in philanthropies
- Celebrating holidays
- Co-sponsoring an event with another student organization. This would also help in growing awareness of Phi Eta Sigma throughout campus
- Sponsoring a local scholarship
- Hosting picnics, banquets, pizza parties, and other social events, especially when campus dining halls are not serving

Resources that may be helpful in planning events are too numerous to list, but include:

- Academic Affairs/Student Life/Dean of Students for special programming

- Space and scheduling resources

These activities may be shared with other groups on campus. The chapter should attempt only as many projects or activities as it can do well. One or two well-conceived and well-implemented activities are much better than several that are dropped before completion or so time-intensive that officers and volunteers have no time to devote to maintenance of chapter resources and records or new member recruitment and induction.

Promotions

Please encourage members to utilize the resources and news on the national office website and social media pages.

One of the most important components of Phi Eta Sigma promotion is to increase awareness of the organization on campus. Most students today want to join organizations that provide them with opportunities to enhance their college career. Officers may be filled with new ideas to accomplish this, but they may not have the experience needed for effective implementation. The adviser can assist chapter leaders in selecting the best ideas and developing a plan to make them a success. By offering just a few carefully selected and well-organized activities and events, your chapter can offer valuable opportunities that will increase your officers and general members' knowledge, skills, and abilities while generating "buzz" about Phi Eta Sigma on campus.

Keeping current members informed may increase the number of active members your chapter has, thereby increasing the number of opportunities you can offer, which will make joining Phi Eta Sigma more desirable. The creation and maintenance of a local chapter Blackboard, social media page, and/or website may be worthwhile, as are regular emails to members.

As chapter leaders seek to promote Phi Eta Sigma among current members, potential recruits, and college faculty and staff, they should also consider family and community, alumni, and/or Phi Eta Sigma's national office resources in the development of a public relations plan.

If the college or university operates a newspaper or public affairs department, the adviser should see that these departments receive a list of all inductees, with their classification and home addresses. Hometown newspapers usually give space to news about academic achievements if a press release is provided. Such publicity in hometown papers is excellent public relations for the institution, and it makes parents proud and happy.

The chapter adviser's personal letter of congratulations thrills parents even more. As part of recruiting and inviting students to membership, the chapter adviser should send letters of congratulations on Phi Eta Sigma stationery to the parents of each prospective inductee. You may be assured that these letters are freely exhibited in the home community. In addition, family members may encourage recruits who otherwise may not have joined.

Here are suggested methods for increasing awareness of the organization on campus:

- Open houses or student organizational fairs. This is a major event for first year students as they learn about the different honor societies, clubs, and organizations that the campus has to offer.
- Recruitment mailings and/or e-mails. Chapters can send mailings to current eligible members as well as past eligible members who chose not to join initially. Recruitment mailings can be sent from the adviser, chapter officers, or others.
- Chapter website and/or social media
- Campus public relations websites and/or staff
- Individuals who have the ability to feature your chapter's activities or award winning members on the institution's websites or social media
- Academic dean's offices for inclusion in Dean's and/or President's letters for new qualifiers
- Academic advisers who, if notified of eligible students, can congratulate their advisees and encourage them to join
- Development/Alumni Relations for guidance in fundraising, to assist in locating successful alumni to speak at induction or assist in chapter activities, and/or to identify potential donors
- Chapter apparel should be worn to events and activities, when appropriate. T-shirt sales are an excellent source to raise funds for the chapter.

National Convention

It is highly recommended for the adviser to attend and actively participate in the national convention, which is held every two years. During the convention you will have opportunities to meet other advisers to discuss ideas and strategies for your chapter. It is also an avenue to meet other students, discuss chapter activities, and meet a few of the national scholarship winners. There are workshops for both the students and the advisers. The convention is also where the major business of Phi Eta Sigma is conducted. At least one student member from the chapter should attend the convention to serve as a delegate for conducting Society business. Additional members may attend as alternate delegates, depending on the chapter's support for such travel. A few items to keep in mind pertaining to the national convention:

- Chapters may choose to bring posters, scrapbooks, and promotional items for exhibit in the convention hospitality area. These items may remain on display throughout the convention weekend, and chapter attendees are responsible for collecting them at the end of the event.
- There is an opportunity to share customized marketing items from your institution's Phi Eta Sigma chapter or other items from your institution during the gift exchange early in the convention. Items could include: pens/pencils, koozies, magnets, decals/stickers, t-shirts, hats, etc.

- The convention registration bag includes: lanyard and name badge, convention t-shirt, agenda, and other materials. The name badge serves as your identification to attend the meals and events throughout the convention.
- Roll call at the first business meeting is an opportunity to demonstrate some school spirit. When your chapter's name is called out your team attending should show some spirit in your response.
- Student members have an opportunity to represent their chapters by serving on convention committees:
 - Nominations – limited to seven student members, not representing an institution with a candidate for office or position
 - Constitution and Scholarship – limited to one member per chapter represented

National Executive Committee

If interested, advisers have an opportunity to be more involved in the leadership of Phi Eta Sigma through serving as a member of the Executive Committee. Three advisers serve on the Executive Committee for four-year terms, and three students serve two-year terms. There are adviser Executive Committee member positions open each convention. In addition, advisers may be nominated to run for Grand President, Grand Vice President, or Grand Historian when those positions are available (every four years). Elections are scheduled so as to avoid all experienced members leaving the committee at the same time. In this manner there are several members that can assist the newly elected officers in their orientation to the Executive Committee.

See our current leadership on the Society website, <http://www.phietasigma.org/leadership>.

Distinguished Service Awards

Members of Phi Eta Sigma who have given loyal and devoted service to the Society for a period of no less than five years may be recognized with the Distinguished Service Award.

Nominations may be made to the Executive Director at least three months prior to the date of the national convention by the officers of a local chapter, present and past members of the Executive Committee, former recipients of the Distinguished Service Award, or university officials in institutions where Phi Eta Sigma chapters are located. Refer to Statute VIII in the Constitution and Laws for further details.

Presentation of Distinguished Service Awards is made at the national convention.

Logo Usage

Chapters of Phi Eta Sigma have permission to use the Phi Eta Sigma crest/logo for chapter apparel, stationery, banners, presentations, or any item created for official representation of the Phi Eta Sigma National Honor Society. Download logos from the Adviser Resource area of the Phi Eta Sigma national website.

Policies

Policies Regarding Member Recruitment and Induction

Non-Discrimination: Phi Eta Sigma National Honor Society does not discriminate on the basis of race, color, national or ethnic origin, age, religion, disability, sex, gender identity, sexual orientation, or military or veteran status in the initiation of individual members.

Anti-Hazing Policy: The Phi Eta Sigma Honor Society does not condone any form of hazing. Hazing shall include any mental or physical requirement or obligation placed upon a person by a member of the Society, individual or a group of individuals, which could cause discomfort, pain or injury including, but not limited to, striking, laying open hand upon, treating with violence or offering to do bodily harm to a person with intent to punish or injure the individual, or other treatment of a tyrannical, abusive, shameful, insulting, or humiliating nature. Hazing is an action taken or a situation created, whether during Society functions or other member contact situations, to produce mental or physical discomfort, embarrassment, harassment, or ridicule. Hazing is also considered to be the creation of a situation, which results in or might result in mental or physical discomfort, embarrassment, harassment, or ridicule, including involuntary servitude, often called “personal favors.” Both individual members and the Society chapter may be held accountable for such activity.

Privacy Policy

Phi Eta Sigma National Honor Society, Inc. (“Phi Eta Sigma” or “the Society”) is committed to protecting the privacy of its website visitors and prospective and current members. To that end, Phi Eta Sigma has adopted this policy governing the information collection and handling activities of the Society’s national office.

Definitions

“Personally identifiable information” means any information that identifies or can be used to identify, contact, or locate the person to whom such information pertains. Personally identifiable information does not include aggregate information or information from which personally identifiable elements have been removed.

“Essential information” means any information required by law to be maintained or used and any information necessary to offer or confirm membership in the Society, protect the Society’s interests, or provide a product or service requested by (or respond to an inquiry initiated by) an individual.

Scope

This policy applies to all personally identifiable information held or used by the national office of Phi Eta Sigma. The Society’s chapters are encouraged to adopt similar privacy policies, and to comply with any applicable privacy rules at their institution.

Collection, Storage & Use

Phi Eta Sigma will collect, store, use, disclose, and retain personally identifiable information only as permitted by (and in compliance with) applicable law, and only to the extent necessary and consistent with the purposes and operations of the Society.

Phi Eta Sigma will provide personally identifiable information to third parties only as required by law or as necessary for the Society to carry out its operations. When members join the Society, they consent to give Phi Eta Sigma their personal identifying information. The Society may use this information from time to time to communicate information about the Society and may share this information with the Society’s partners (“Participating Companies”) that have entered into agreements with Phi Eta Sigma in return for the right to use Phi Eta Sigma’s name and access the personal identifying information of its members. Individuals may opt out of such communications and disclosures as described below. In all cases, the Society will (where possible) condition such disclosures on the third party’s agreement to limit the use of such information and to destroy or return all such information to the Society.

Phi Eta Sigma will publicly disclose the names of individuals who serve in national leadership positions and will provide professional contact information for these individuals upon request by third parties.

Phi Eta Sigma will not retain personal information any longer than necessary for the Society’s purposes.

Accuracy

Phi Eta Sigma will strive to ensure that personally identifiable information in its control is accurate and complete. Phi Eta Sigma encourages individuals to inform the Society's national office whenever they believe personally identifiable information about them maintained by the Society is inaccurate or incomplete.

Opt Out & Removal

Phi Eta Sigma will give any person about whom it maintains personally identifiable information the opportunity to opt out of the use of that information for marketing, fundraising, solicitation, or other communications other than those necessary to communicate essential information. Members may opt out of receiving such communications from Phi Eta Sigma by sending an email to that effect to phi.eta.sigma@wku.edu.

Phi Eta Sigma will, upon request, remove from its records any personally identifiable information that it maintains about any person, except for essential information.

Web Site

Phi Eta Sigma's website located at www.phietasigma.org does not require visitors to provide any personally identifiable information in order to access all pertinent information about the Society. Phi Eta Sigma will collect personally identifiable information on visitors to its website only as required by law or as necessary to protect the Society's interests or provide information requested by the visitor, and only after having provided notice and obtained consent to the collection of such information.

Security

Phi Eta Sigma will employ technological and other means to ensure the security and integrity of the personally identified information it maintains. The security measures used by the Society will be appropriate to the nature of the information and the potential harm to individuals of its unauthorized disclosure or use.

The Society will destroy records containing personally identifiable information in such a manner as to avoid any reasonably foreseeable risk of the information being recovered.

Phi Eta Sigma will exercise special care when disposing of computers, recording devices, and other technologies to ensure that any personally identifiable information they might contain is erased or destroyed.

Training and Enforcement

Phi Eta Sigma will train its personnel in the requirements of this policy and will use all appropriate means to ensure that the policy is followed.

Revisions

Phi Eta Sigma may revise or amend this policy from time to time.

Questions

Any questions about Phi Eta Sigma's privacy policy, website practices, or information collection and handling procedures may be directed to the national office by email at phi.eta.sigma@wku.edu or by phone at (270) 745-6540.

Appendix – Samples and Templates

Please see the following pages for examples of invitations and communications your organization may find useful.

- Press Release Template
- Suggested Membership Invitation Wording
- My Honor Society Online Enrollment Invitation Email Template

Subsequent pages contain samples (listed below) of recruitment and informational correspondence provided by Florida State University. If you wish to utilize these suggested communications, please be sure to customize the wording for your chapter.

- Letter from dean to student encouraging membership
- Email to first time qualifiers before letters sent
- Invitation letter to student
- Informational event flyer – included with the student letter along with the PES brochure
- Notification letter to parent – sent to parents of first time qualifiers
- Email invitation for past qualifiers – email to students who qualified in the past, did not join, but still qualify
- Email regarding upcoming events – email sent to all qualifiers a few days before the informational event
- Email reminder to qualifiers – deadline to join approaching
- Email extending deadline to join

Press Release Template



Contact: (replace with chapter contact info)

Beth Britton

Phi Eta Sigma National Honor Society, Inc.

270-745-6540

phi.eta.sigma@wku.edu

FOR IMMEDIATE RELEASE

Press Release Title Goes Here

BOWLING GREEN, Ky. – September 5, 2014 – Enter body content here.

About Phi Eta Sigma (replace with chapter boilerplate)

Founded in 1923 at the University of Illinois, Phi Eta Sigma is the nation's oldest and largest honor society for first-year college and university students in all disciplines. The society has more than 370 chapters in the United States. For more information, visit www.phietasigma.org.

Suggested Membership Invitation Wording



(Date)

Dear _____:

Phi Eta Sigma National Honor Society is the nation's oldest and largest academic honor society for recognizing and rewarding outstanding achievement in first-year college students. We are pleased to notify you that your scholastic average meets the requirements for admission to Phi Eta Sigma, and we hereby invite you to become a member. We believe this to be the greatest honor attainable by a first-year student on this campus, and we wish to extend to you our sincere congratulations on your achievement.

The one-time fee for membership in Phi Eta Sigma is reasonable at \$____. Of this, \$35 goes to the national office for your engraved certificate, your key or tie tac, and the *Forum* magazine, as well as supporting the national scholarship program, hosting a biennial national convention, and covering other expenses of the national office. The local chapter will use the remaining portion of the membership fee for holding the induction ceremony, conducting various service activities, and supporting a local scholarship. This initiation fee constitutes the only expense of your joining, and there are no further dues, fees or assessments collected after you become an active member.

If you accept this invitation to join Phi Eta Sigma, please register (specify method for registering and paying fee) _____. Please indicate on your registration whether you wish to receive a tie tac (pin) or a key (charm). The initiation ceremony and banquet (or reception) will be held on (specify date, time & location) _____. We hope to have the pleasure of welcoming you personally into the (university name) Chapter of Phi Eta Sigma.

Sincerely,

_____(Name)_____, Chapter President

_____(Name)_____, Chapter Adviser

Enclosures (may include information brochure, details about ceremony, membership slip or other registration form, RSVP form for guests to attend reception or banquet, etc.)

My Honor Society Online Enrollment Invitation Email Template

Dear {first-name},

Congratulations! On behalf of the Phi Eta Sigma National Honor Society at INSERT NAME OF SCHOOL, **we wish to congratulate you on your outstanding academic achievement.** Your success has made you eligible for membership in Phi Eta Sigma National Honor Society. Your eligibility for membership is based on your high GPA of 3.5 or better during your first term or year of college while enrolled full-time. **We congratulate you on attaining this high standard!**

Membership in Phi Eta Sigma shows that you are a highly successful college student, which is an excellent point to include on your resume. Additionally, members get all of the support and recognition that comes from being part of a recognized, well-established Society with more than 1.1 million lifetime members. But the benefits don't end there:

- Members receive a membership certificate, Phi Eta Sigma jewelry, and a copy of the Society's annual news publication, the Forum.
- National Phi Eta Sigma offers **nearly \$300,000 in scholarships and awards** to its members each year, with approximately \$240,000 in assistance to undergraduate members and \$55,000 for members pursuing graduate or professional studies.
- Local service projects and other programs give members the opportunity to effect positive change in the campus, local, and national communities.
- Leadership opportunities with Phi Eta Sigma start in the first year – start developing your leadership skills now and make your mark as a campus leader early on!
- Recognition for members doesn't end in the first year – members are eligible to wear Phi Eta Sigma honor cords or medallions at graduation, and members who maintain their academic excellence throughout their college career may receive additional recognition as seniors.
- Membership in Phi Eta Sigma **requires no additional time commitment.**

All of this for one low, one-time dues payment of {dues} – among the lowest of any national honor society!

To accept your invitation and become a member of Phi Eta Sigma, follow the instructions at the end of this e-mail. You must accept your membership invitation by {expiration date}!

Founded in 1923 at the University of Illinois, Phi Eta Sigma has more than 370 chapters in the United States. By inviting you to become a member of this prestigious honor society, we hope to encourage you to maintain academic excellence throughout your college career and to offer you the opportunity to develop friendships with other students who have serious academic interests.

For answers to any questions you may have regarding Phi Eta Sigma, there will be information sessions held TIME AND LOCATION OF INTEREST SESSIONS or you may contact the chapter

president NAME AND CONTACT INFO or chapter adviser NAME AND CONTACT INFO. We also encourage you to visit the national web site at www.phietasigma.org and the chapter website at LOCAL WEBSITE OR FACEBOOK PAGE.

We hope you will take advantage of this exceptional opportunity to affiliate yourself with a national community of scholars - just follow the instructions at the end of this e-mail!

Sincerely,

INSERT SIGNATURE LINES FOR ADVISER AND/OR OFFICERS

Letter from dean to student encouraging membership

February 21, 2013

Ms. Susie Seminole
1 Florida State Boulevard
Cranford, Cheshire

Dear Ms. <Last Name>,

It is a great pleasure to recognize you for earning a place on the Dean's List for your academic achievement in the fall 2012 semester. The beginning of a new year is an excellent time to pause and reflect on the accomplishments of the previous year. Please accept my most sincere congratulations on your academic success.

Inclusion on the Dean's List is a formal acknowledgment of your hard work and dedication to your academic pursuits. You have achieved a great deal, and I hope this commendation will encourage you to continue your progress toward your goals, both in and out of the classroom.

I also hope that this recognition will be just one of many honors marking your undergraduate career. You will soon receive an invitation to join Phi Eta Sigma, the national honor society whose goal is to encourage and reward academic excellence among first year students in institutions of higher learning. I hope you will seriously consider joining this and/or other University-sanctioned honor societies should you be invited to do so. If you would like more information about the honor societies that are officially recognized by Florida State, please visit the Honor Societies website at <http://honorsocieties.fsu.edu/>.

I wish you a productive and satisfying spring semester and hope you will continue to succeed in your studies. On behalf of the entire University community, I thank you for your contributions to Florida State.

Sincerely,

Dean's Name, Title
Undergraduate Studies

Email to first time qualifiers before letters sent

Congratulations <First Name>!

Based on your outstanding academic accomplishments, we are pleased to invite you into membership in the Phi Eta Sigma National Honor Society. As one of the most active University-wide scholastic societies, our members have received a total of \$124,000 in undergraduate and graduate scholarships since 2007.

Be sure to check your mail for an invitation to join and an application! You will have the option to join online or in-person during our open house on **Friday, February 15, 2013**, in University Center A room 4313. Upon arrival you will complete a membership form and submit your \$80 check or money order (no cash please). Phi Eta Sigma t-shirts will also be available to purchase at the membership drive for \$15.

Also be on the lookout for our upcoming events during the second week of February! We look forward to meeting you!

Best wishes,

Phi Eta Sigma

Invitation letter to student

January 26, 2013

Congratulations <First Name>!

Your outstanding academic achievements have qualified you to become a member of the Phi Eta Sigma National Honor Society. Since 1923, membership in Phi Eta Sigma has identified students with a record of superior academic performance to employers, professional schools, and graduate institutions. Our members have the opportunity to promote excellence amongst peers and benefit from scholarships, leadership, and academic opportunities.

TO JOIN ONLINE

- Between **February 1-15, 2013**, log on to <https://www.link.com>.
- Pay your one-time only lifetime membership fee of \$80 using a major credit card.

TO JOIN IN PERSON

- **Date:** Friday, February 15, 2013
- **Time:** Noon to 4:00pm
- **Location:** University Center A room 4313

Upon your arrival, you will complete a membership form and submit your **\$80.00** check or money order (**no cash please!**) Phi Eta Sigma t-shirts will also be available for purchase at the membership drive for \$15.

Membership forms will only be accepted when submitted with the fee and may not be accepted after the **deadline of February 15, 2013**.

To learn more about Phi Eta Sigma please join us at our **Black & Gold Affair on February 12, 2013**, at 6:00pm in the Oglesby Union Ballrooms. Our leadership team will be there to answer your questions and refreshments will be provided. Information can also be obtained through our National website at <http://www.phietasigma.org/>, through our Local Chapter website at <http://undergrad.fsu.edu/PES/>, or through the all University sanctioned honor society website at <http://honorsocieties.fsu.edu>.

If you have any questions, please e-mail PhiEtaSigma@fsu.edu.

Best Wishes,

<Co-President Names>

Co - Presidents, FSU Chapter
Phi Eta National Honor Society

Informational event flyer

You are invited to
Phi Eta Sigma
National Honor Society's
annual
Black and Gold Affair

Hosted by the Florida State University chapter



Tuesday, February 12, 2013
6:00 – 8:00pm, Union Ballrooms

Enjoy hors d'oeuvres and meet our Leadership Council.

Dress style is optional. Black and/or gold attire is suggested.

Notification letter to parent

January 26, 2013

Dear parent or guardian of <Student First & Last Name>,

We are pleased to inform you that an invitation to join the Phi Eta Sigma National Honor Society, one of only five University-wide sanctioned scholastic honor societies, has been extended to <Student First Name>. Offering many benefits including awards and scholarships, since 2007 this organization has awarded our chapter nominees a total of \$124,500 in undergraduate and graduate scholarships.

<Student First Name> has been provided with instructions for joining Phi Eta Sigma online between February 1 and 15 at <https://www.link.com>.

After joining, <Student First Name> will be mailed an invitation to attend the March 24, 2013, induction ceremony where she will be presented with a certificate of membership, membership pin, and honor cord to be worn at graduation. We hope that you and your family will attend this special celebration.

Further, we invite you to submit a congratulatory message for <Student First Name> to be included in the induction program. Please submit your message by February 15 at <https://www.link.com>.

Please consider making a donation to our endowed Phi Eta Sigma Undergraduate Research Award. You may make a donation online at <https://www.link.com>.

More information about our organization can be found at the following websites:

- Local Chapter Website: <http://undergrad.fsu.edu/PES/>
- Phi Eta Sigma National Office: <http://phietasigma.org/>
- All University sanctioned honor societies: <http://honorsocieties.fsu.edu>

If we can be of assistance, please do not hesitate to contact us via email at PhiEtaSigma@fsu.edu.

Best wishes,

<Co-President Names>

Co - Presidents, FSU Chapter

Phi Eta Sigma National Honor Society

Email invitation for past qualifiers

Congratulations «First Name»!

Based on your continued outstanding academic accomplishments, your invitation to join the Phi Eta Sigma National Honor Society has been extended. Since 1923, membership in Phi Eta Sigma has identified students with a record of superior academic performance to employers, professional schools, and graduate institutions. As one of the most active University-wide scholastic societies, our members have received a total of \$124,500 in undergraduate and graduate scholarships since 2007.

TO JOIN ONLINE

- February 1-15, 2013
- <https://www.link.com>

TO JOIN IN PERSON

- Date: February 15, 2013
- Time: Noon to 4:00pm
- Location: University Center A, room 4313

Upon your arrival, you will complete a membership form and submit your \$80.00 check or money order (no cash please!). In addition, Phi Eta Sigma t-shirts will be available for purchase at the membership drive for \$15.

Membership forms will only be accepted when submitted with the fee and may not be accepted after the deadline of February 15, 2013.

Please attend our Black & Gold Affair to meet our leadership team and learn more about Phi Eta Sigma. Refreshments will be provided.

- Date: February 12, 2013
- Time: 6:00 – 8:00 pm
- Location: Oglesby Union Ballrooms

Information about Phi Eta Sigma can also be obtained through our national website <http://www.phietasigma.org/> and our local chapter website at <http://undergrad.fsu.edu/PES/>.

If you have questions, please e-mail PhiEtaSigma@fsu.edu.

Best wishes,

Email regarding upcoming events

Dear «Name__First»,

Congratulations on your invitation to join the Phi Eta Sigma National Honor Society! If you have not already joined, you can still do so until February 15, 2013. The option to join online is available until February 15, 2013 at: <https://www.link.com>. Additional information about Phi Eta Sigma can be obtained through our national website at <http://www.phietasigma.org/> and for our local chapter website at <http://undergrad.fsu.edu/PES/>.

We would also like to invite you to join us for this week's upcoming events.

Tuesday, February 12, 2013 – Black & Gold Affair

Join us in the Union Ballrooms from 6-8 pm to meet our Leadership Council and learn more about our great honor society. Refreshments will be provided. Evening attire is optional.

Wednesday, February 13, 2013 – Wear Your Phi Eta Sigma T-shirt Day

Look for current members wearing their Phi Eta Sigma t-shirt and visit us at Market Wednesday from 10 am – 2 pm. We will be available to answer any questions you have about Phi Eta Sigma.

Thursday, February 14, 2013 – Phi Eta Sigma Spreads the Love

Look for our members wearing their Phi Eta Sigma buttons around campus and ask them for one!

Friday, February 15, 2013 – Phi Eta Sigma Open House

Come by the Phi Eta Sigma office in UCA 4313 to complete your membership application (if you have not already completed your application on-line) and submit your dues of \$80 by check or money order. T-shirts will also be available for purchase.

If you are an Honors student, be sure to look for us at your Honors Colloquium this Monday! We will be available if you have additional questions about joining or getting involved in Phi Eta Sigma.

Also, come cheer on current Phi Eta Sigma members as they participate in the Council of Honor Societies' Brain Bowl on Tuesday, February 19 from 6:30-7:30pm at The Globe.

We hope to see you at these events!

Best wishes,

Email reminder to qualifiers

Good Afternoon <<Name>>,

We are getting close to the deadline of February 15, 2013, to join our chapter of Phi Eta Sigma National Honor Society.

You may join online at: <https://www.link.com>. Or you may come to our In House Membership Drive on Friday, February 15, 2013 from 12pm-4pm at UCA 4313. We will only be accepting checks and money orders at this time.

Our chapter of Phi Eta Sigma will also be participating in The Big Event. The Big Event is one of the largest, one-day, student-run service project in the nation where the students of colleges and universities will come together on Saturday, February 23, 2013 to say 'thank you' to the residents of their college town. It is also a great way to get involved with our Phi Eta Sigma chapter. If you are interested in participating in The Big Event with Phi Eta Sigma you may fill out this quick Qualtrics survey. https://fsu.qualtrics.com/SE/?SID=SV_byeN7kC7V1a9t6R

Also make sure to come out to cheer on our chapter as they compete in The Brain Bowl on February 19 at 7pm at The Globe Auditorium.

Please let us know if you have any additional questions.

<Officer Names>

Phi Eta Sigma Executive Board, Co-chairs New Membership

Email extending deadline to join

Good Afternoon <<Name>>,

Due to high demand, we are extending the deadline to join Phi Eta Sigma through the weekend.

You can join online at: <https://www.link.com>.

Please let us know if you have any additional questions.

Phi Eta Sigma

Membership Drive