



KAPPA KAPPA PSI  
NATIONAL HONORARY BAND FRATERNITY

# OFFICER RESOURCE MANUAL

## FOR THE CHAPTER TREASURER

KAPPA KAPPA PSI  
★ MUSICIANSHIP • LEADERSHIP • SERVICE

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## OATH OF OFFICE OF KAPPA KAPPA PSI

I, (state your full name), in the presence of Almighty God and the Brothers of Kappa Kappa psi here assembled, do hereby swear that I will perform the duties of my office, as set forth in the Consitution of Kappa Kappa Psi, to the best of my ability, and in the best interests of the Fraternity.

In accepting this office, I solemnly promise without reservation, to devote sufficient of my time and energies to fulfill all obligations placed upon me in pursuance of my duties.

I hereby reaffirm my ritualistic vows, and rededicate myself to the promotion of the ideals of the Fraternity, the maintenance of its traditions, and the preservation of its honor. So help me, God.

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# KAPPA KAPPA PSI VISION MISSION AND VALUES

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## **KAPPA KAPPA PSI VISION, MISSION, AND VALUES**

The Kappa Kappa Psi Vision, Mission, and our Values (our Creed, Purposes, and Fraternal Code of Conduct) should be the foundation for any chapter activity. As an officer it is important to educate other members about their significance. Let these guide you and be the foundation of decisions and discussions.

### **VISION**

Kappa Kappa Psi empowers and influences the vibrant and diverse college band movement through purposeful programming, unified messaging, and excellence in service and operations.

### **MISSION**

Kappa Kappa Psi is a co-educational fraternal organization that advances college and university bands for the benefit of its members and society through dedicated service and support to bands, encouragement of musical growth, lifelong educational experiences, leadership opportunities, and recognition.

### **OUR VALUES**

#### **Creed**

We, the brothers of Kappa Kappa Psi, believe that service to the college or university band program fosters responsibility, loyalty, and leadership; that a spirit of brotherhood is enhanced by the participation in a band program; that music is a universal language and truly the greatest of the arts; and that through fraternal participation, each member will strive for the highest.

#### **Purposes of Kappa Kappa Psi**

Be it known that Kappa Kappa Psi, National Honorary Fraternity for College Bandmembers, is an organization operating exclusively in the field of the college and university bands, and for the following several purposes:

- (1) To promote the existence and welfare of the college and university bands and to cultivate at large a wholesome respect for their activities and achievements.
- (2) To honor outstanding bandmembers through privilege of membership extended as a reward for technical achievement and appreciation for the best in music.
- (3) To stimulate campus leadership and promulgate an uncompromising respect through the medium of the college band for gracious conduct, good taste and unswerving loyalty.
- (4) To foster a close relationship between college bands and promote a high average of attainment by the performance of good music and selection of worthwhile projects.
- (5) To provide a pleasant and helpful social experience for all engaged in college band work and to cooperate with other musical organizations in any manner consistent with the purposes of the institution at which chapters are located.

## FRATERNAL CODE OF CONDUCT

Brothers of Kappa Kappa Psi are looked to as role models and leaders by other members in the band and on campus. We can never know who is watching our actions or who will be affected by our deeds. It is therefore essential that we present positive qualities at all times. Being a Brother is not a part time commitment. As such, the example we set should shine constantly to inspire others. The following qualities define Brothers of Kappa Kappa Psi. These qualities described Bohumil Makovsky, our Guiding Spirit. By following Boh's example, we will teach and inspire others, as he taught and inspired our Founding Fathers.

### Honor

Brothers should conduct themselves with honor at all times. Our service to college and university bands serves as an example to others. We should take pride in these accomplishments and not let anything tarnish our honorable reputation.

### Integrity

The character of our brotherhood is based upon the principles of decency and sincerity. Our impeccable integrity lets others know we can always be trusted to keep our word.

### Respect

Respect for others is a cornerstone of Kappa Kappa Psi. Our diverse membership is an asset that cannot be taken for granted. Using this strength to our advantage requires respect for others and their points of view. In return, we earn the respect from others by treating them as equals.

### Loyalty

Service to band programs and the Fraternity require people who are devoted to those organizations. Working together is the key to achieving our goals. Being loyal and dependable is therefore essential to our success.

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# KAPPA KAPPA PSI TREASURER'S ROLE

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## TREASURER'S ROLE

### **Per the 2017-2019 National Constitution:**

6.210 The Treasurer shall control the receipts and disbursements of all monies of the chapter, and shall submit recommendations concerning the financial policies of the chapter as may be required. The Treasurer shall co-sign all checks for monies disbursed and shall prepare and be responsible for keeping Kappa Kappa Psi National Constitution records of all chapter finances.

Handling money is always a tremendous responsibility, but handling other people's money represents an even greater responsibility. By electing you, your fellow members are implying that you are one person they feel would be punctual, persistent and fair in collecting, disbursing, maintaining and accounting for their funds. It cannot be emphasized enough that the treasurer must stay current with the bookkeeping procedures he/she has agreed to undertake. You must post receipts and disbursements on a regular basis. It is suggested that you collect and submit your membership dues and chapter fees to avoid a 25% late fee later. Technically, your chapter is not activated for the year until your Chapter Fee and Member Dues have reached the National Headquarters. Chapters are placed on probation by the National Headquarters for failure to pay Chapter Fee and Member Dues by the SEPTEMBER 30 deadline.

The material in this manual will answer many of your questions but please do not hesitate to let us know when you need help. Copies of your chapter ledger sheet, statements, and other material on file at the National Headquarters, are available to you. We are accountable to you at all times. Together, we can keep all financial transactions working for the benefit of both the chapter and the National Organization. As Treasurer your responsibility and obligations of your office cannot be over emphasized. The following suggestions are made in an attempt to assist you with your many responsibilities. When in doubt, ask other chapter officers and/or your chapter sponsor for advice.

### Key Areas of Responsibilities

#### **Chapter Operations**

- Control the receipts and disbursements of all monies of the chapter.
- Submit recommendations concerning the financial policies of the chapter as may be required.
- Sign all checks for monies disbursed. To protect your chapter's funds, be sure your chapter checking account has at least two people designated to sign all checks. You might choose to have the chapter president, chapter treasurer, and chapter sponsor as authorized signatures.
- Although most banks will allow you to apply for ATM cards, do not apply for them in order to ensure the safety of your chapter funds.
- Be responsible for keeping records of all chapter finances. If possible, use a computer program such as QuickBooks®.
- Retain a copy of every financial transaction.
- Provide chapter financial report at each meeting.
- Contact your University Accounting Services early enough to requisition funds (where



applicable) before deadline.

### National Operations

- Submit the annual Chapter Fee and Membership Dues by SEPTEMBER 30. Failure to submit dues within 30 days of deadline will result in a 25% late fee.
- Submit the Initiate Registration Form with Initiate Fees within 30 days of initiation. Failure to submit dues within 30 days of deadline will result in a 25% late fee.
- Properly use all National Headquarters forms and retain a copy for chapter files.
- Prepare supply orders. Be sure to include the full payment with order.

### TREASURER REPORTS

A report of the chapter treasurer should be given at each meeting. Be sure to report what you have accomplished and not what you intend to accomplish. Your report to the chapter does not need to be lengthy; it could be as simple as the following:

Balance of Last Report     \$ \_\_\_\_\_

Total Receipts                 \$ \_\_\_\_\_

Less Total Expenditures     \$ \_\_\_\_\_

Current Balance                 \$ \_\_\_\_\_

Please be sure to retain a copy of every financial transaction. It is important to stay current and to be prepared to assist your successor when your term of office has ended.

### HOW TO WRITE A CHECK

Sometimes it's the small things that get you: You might be familiar with checks, but you get stuck writing out the amount. Writing a check with cents is especially tricky, but with a little bit of practice, you'll soon be able to do it without thinking.

**IMPORTANT: WHEN WRITING A CHECK, ALWAYS WRITE CLEARLY AND NEATLY!** Also, always use a black or blue ink pen – all other colors cannot be read by scanning equipment used by check processing companies.

**Jane Doe**  
123 Main St  
Anywhere US 10111

Date 07/01/2018 790

PAY TO THE ORDER OF ACME Grocery Shop \$ 8.15

EIGHT AND 15/100 DOLLARS

Your Bank  
456 Main St  
Anywhere US 10111

MEMO Lunch w/Friends Jane Doe

① ② ③ ④ ⑤ ⑥

①: 1 2 3 4 5 6 7 8 9 ②: 1 0 0 1 0 0 1 2 3 9 ③ 0 7 9 0

**Step One:****Date**

You must write the date on the check. It can be DD/MM/YYYY (02/01/2018), DD Month YYYY (1 February 2018), or Month DD, YYYY (February 1, 2018).

**Step Two:**

Write the name of the person or business that the check is going to.

**Steps Three and Four:**

For example, assume you need to write a check for eight dollars and fifteen cents (that's \$8.15).

There are two steps:

- Write the amount using numbers (see the red number **three** in the picture above).
- Write the amount using words (see the red number **four** in the image above).

First, write the amount in numeric form in the dollar box, located on the right side of your check next to the dollar sign (“\$”). Start by writing the number of dollars (“8”) followed by a decimal point or period (“.”), and then the number of cents (“15”). Ultimately, you’ll have “8.15” in the dollar box.

Next, to write out the check’s amount in words, the two steps are similar:

- Write out the dollar amount.
- Write the word “and.”
- Write out the number of cents.

The tricky part is putting the number of cents into fraction format. To do so, write the number of cents, then write a slash (“/”), and then write the number 100. Technically, this is the

fractional amount of whole dollars.

Using our \$8.15 example, write the following:

“Eight dollars”

“and”

“15/100”

Write everything together on one line so that it reads “Eight dollars and 15/100.”

Now that you have the basic idea, let’s look at the example in more detail.

**No “cents”:** You might notice that the word “cents” doesn’t appear anywhere—you don’t need to use it when writing a check. It is sufficient to simply put the number of cents into the format above. If you want, you can certainly write “fifteen cents,” but it’s easier and faster to use the fraction format. Plus, your check probably has the word “Dollars” at the end of the line, so it would not make sense.

**The word “and”:** Include the word “and” just before you write how many cents the check is for (or just after you write out the full dollar amount). You are writing a check for dollars and cents. If you like, you can use an ampersand (“&”) or plus sign (“+”) instead. It is best not to use the word “and” elsewhere when you write out the amount. For example, the following example is incorrect, and the word “and” should be removed: “One hundred and five dollars.”

### Percentages

It might help to think in terms of percentages: The word percent comes from a Latin term that roughly translates to “per 100.” That’s why cents are called “cents”—each one is one *percent* of a dollar. Another way of looking at it is to consider that each cent is one one-hundredth of a dollar. When you write a check, you note how many dollars the check is for, including whole dollars as well as partial dollars—or cents.

**\*\*It is VITAL that the number written in box 3 matches what you write out longhand on line 4!** If they do not match, the bank will either reject the check, or submit it for the amount written out longhand.\*\*

### Step 5:

#### Signature

***Make absolutely sure that you sign the check!*** For checks written on the chapter account, the check will need **two signatures** for the bank to accept it – Treasurer and President/Sponsor/Director of Bands. Each chapter has their accounts set up differently as to who the second signer is on record with the bank.

### Step 6:

#### Memo Line

Always document what the check is being written for in the memo line (#6 on the picture).

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# KAPPA KAPPA PSI SPONSOR AND DIRECTOR OF BANDS' ROLES

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## SPONSOR AND DIRECTOR OF BANDS' ROLES

Per the National Constitution:

6.101 Chapters of Kappa Kappa Psi Fraternity shall be established throughout the general jurisdiction of the Fraternity at academically accredited colleges and universities with the permission of the Director of Bands, and then operate in a manner consistent with this document, the rules and regulations of the college or university, local ordinances, and state and federal laws. The Director of Bands is responsible for governing and monitoring the activities and affairs of the local chapter. The Director of Bands may choose to appoint an individual to serve in the role of Chapter Sponsor. The National Council shall recognize the authority of the Chapter Sponsor appointed by the Director of Bands; however, the Director of Bands has ultimate authority in matters pertaining to the chapter. The Chapter Sponsor and Director of Bands are members ex officio of all chapter committees.

6.206 The Sponsor shall operate under the authority of the Director of Bands. The Sponsor acts as a consultant to the chapter and assists the group in its growth and development. He/She provides direction through advice, understanding and clarification.

6.203 ...The Chapter Sponsor shall have the authority to exempt any officer from a specific requirement of office.

The sponsor should be the liaison between the chapter and the college or university music/band faculty. The sponsor acts as an advisor to the Chapter President and members of the chapter concerning operations and activities of the chapter. They should be familiar with all of the local institution regulations and policies as well as those of the national organization. On some campuses the sponsor can be legally liable for any actions incurred by the organization.

### Key Areas of Responsibility

#### **Chapter Operations**

- Attend meetings and functions of the chapter.
- Work closely with the chapter president and other officers.
- Be aware of all activities: social, ritual, service, membership education, or prospective member recruitment.
- Sign all checks for monies disbursed. To protect your chapter's funds, be sure your chapter's checking account has at least two people designated to sign all checks. The chapter may choose to have the chapter president, chapter treasurer and the chapter sponsor as authorized signatures.
- Review the chapter financial statements on a regular basis.
- Set annual, long-range, and short-range goals for the chapter with chapter officers and members.

**Communications**

- Communicate regularly with President.
- Communicate regularly with Executive Council.
- Communicate regularly with membership.
- Communicate regularly with Director of Bands and/or university faculty.
- Communicate regularly with District Governor and District Council.
- Communicate when needed with the National Council and Headquarters.

**Membership Education Program**

- Approve dates of prospective member recruitment.
- Review and approve Membership Education Program activities.
- Advise in the membership selection process.
- Review and approve the continuing Membership Education Program of Active members.
- Attend rituals.

**Reports**

- Review and endorse the following reports:
  - Chapter Personnel Report, due 9/30
  - Fall Activity Report, due 12/1
  - Chapter Summary Report, due 6/1
  - Initiate Registration Form, due within 30 days of initiation
  - Candidate Registration & Risk Management Policy Form: Completed and signatures submitted to HQ within 7 days of 1st Degree

**Some Notes:**

- Chapters cannot select their Sponsors. Only the Director of Bands can select Sponsors.
- At many chapters, the Director of Bands and the Sponsor are the same person. Also, there are chapters that have a Director of Bands and several Sponsors. Both are acceptable arrangements.
- Sponsors and Directors of Bands are not officially recognized as such by National Headquarters unless reported via the Sponsor and DOB Form on the OMRS. Whenever there is a change of Sponsor and/or Director of Bands for your chapter, it must be reported IMMEDIATELY.

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# KAPPA KAPPA PSI REPORTING AND PAPERWORK

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## REPORTING AND PAPERWORK 2017-2019 BIENNIUM

### STATUSES AND FEES

Active:	\$100/year
Conditional:	\$100/year
Associate:	\$100/year
Initiate:	\$110/year
Inactive:	\$0/year (Inactive is reserved for members who do not pay dues)
Alumni:	\$50/year (Optional KKPsi Alumni Association Membership, payable directly to the KKPsi Alumni Association. Alumni status is not affected if membership is declined)
Life:	\$500/one-time fee
Honorary:	\$50/one-time fee

Chapter Fee: \$75/year

**\*\*Please refer to section 5 in the National Constitution for specific definitions of each membership status.\*\***

### DEADLINES

*Complete these forms and reports at <https://online.kkysbs.org/>*

Chapter Personnel Report (Dues & Chapter Fee):	September 30 <sup>th</sup> / October 15 <sup>th</sup> (Quarter)
Initiate Registration Form:	Within 30 days of Initiation
Honorary Membership Form:	Within 30 days of Initiation
Fall Activity Report:	December 1 <sup>st</sup>
Chapter Summary Report:	June 1 <sup>st</sup>
Graduating Senior Report:	End of each semester
Candidate Registration & Risk Management Policy Form:	Completed and signatures submitted to HQ within 7 days of 1st Degree

### CHAPTER FEES AND MEMBERSHIP DUES

The Annual Chapter Fee should be submitted as early as possible and should be accompanied by Membership Dues for each Active, Conditional and Associate member, along with the signed summary page for the Chapter Personnel Report (which must be submitted and approved through the Online Membership & Reporting System).

If submitted to the National Headquarters by SEPTEMBER THIRTIETH (9/30) this allows your chapter to be eligible to apply for certain chapter awards. The National Headquarters will not accept half year membership dues or dues for a person who is not listed on your master roster. Transfer students and/or other name changes should be explained to prevent any delay in processing your membership cards.



Every person who participates as a member of the chapter must have a current membership card. Failure to report by SEPTEMBER 30TH deadline will result in a 25% penalty on the outstanding balance and the chapter being placed on PROBATION with all chapter activities being suspended.

## INITIATE AND HONORARY MEMBER REGISTRATION

The proper registration of new members requires timely reporting. Failure to report new members within 30 days of the date of initiation will result in a 25% penalty being assessed, and delays proper recognition of new members. Accurate and complete paperwork, including initiation date, are required to process new member materials.

## REPORTS

Two (2) activity reports must be submitted to the National Headquarters each year. The Chapter President will assume the responsibility for submitting the Chapter Fall Activity Report prior to DECEMBER FIRST, and the Chapter Summary Report no later than JUNE FIRST. Chapters who fail to submit these two consecutive reports to the National Headquarters will automatically be placed on PROBATION.

## ONLINE MEMBERSHIP & REPORTING SYSTEM

The Online Membership & Reporting System (OMRS) went live to our members in November 2012. The OMRS can be accessed at <https://online.kkysbs.org>. Paper forms are no longer accepted for many reports filed by chapters. The summary pages for Initiate Registration, as well as Active, Conditional, and Associate members on Chapter Personnel Report and Update, require signatures of the members signifying they have read and agree to risk management policies. Submissions are not considered complete until they have been approved by Sponsor & DOB and are correctly submitted to National Headquarters. For forms involving money, once you set submission status to "Form & Payment Sent to National Headquarters" and mail your check to HQ, the form is considered completed by the Chapter.

## NATIONAL PUBLICATION

*The PODIUM* offers the opportunity to publicize your chapter and band activities by submitting an article for publication. Communication is vital to a growing organization such as ours. News articles; personality profiles; special projects or activities; editorial comments from your members; all of this may be worthy of publication. Copy deadline dates are DECEMBER FIRST AND MAY FIRST.

Your articles may be submitted via E-mail to [podium@kkysbs.org](mailto:podium@kkysbs.org), on CD, or online via the submission form on [the Podium Online](#). Good quality photographs are always appreciated, in digital form of at least a 300 dpi resolution. Each chapter will receive one printed copy of *The PODIUM*. Additional copies for your chapter can be requested in advance by notifying the national headquarters.

## INFORMATION CHANGE FORM

Each time new officers are elected and installed, the National Headquarters should be notified through use of Officer & Chapter Update in the Online Membership & Reporting System. It is the responsibility of the Chapter President to submit this information to the National Headquarters.

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# KAPPA KAPPA PSI OFFICERS' CHECKLIST

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## OFFICERS' CHECKLIST

The following checklist should be used as a reminder and as a guide. It is designed to assist you as a chapter officer. This checklist is not just for the President, but for all officers.

### **NATIONAL HEADQUARTERS REPORTS/FORMS**

Chapter Personnel Report  
 Fall Activity Report  
 Fall Initiate Registration  
 Fall Graduating Senior Report  
 Spring Initiate Registration  
 Spring Graduating Senior Report  
 Chapter Summary Report

### **FEES AND DUES**

Active/Conditional Members: \$100.00  
 Initiates: \$110.00  
 Honorary Members: \$50.00  
 Chapter Fee: \$75.00

### **LATE FEE**

A 25% penalty will be assessed on all fees and dues submitted late. Please ensure that all money is submitted prior to the deadline in order to avoid additional fees.

### **OFFICIAL CHAPTER E-MAIL ADDRESS**

The National Headquarters has created a free and permanent e-mail account for each chapter. Make sure you have claimed your official e-mail address, and use this account for all communications with National Headquarters.

In order to facilitate communication between chapters and the National Headquarters, an official e-mail account has been created for every chapter. This account is free and permanent, with an easy-to-remember address, and because it belongs to the chapter and not to a particular individual, your chapter will not have to change its e-mail address when personnel or officers change. Your official chapter e-mail address is simply the name of your chapter spelled as one word in lower case letters, followed by “@kkpsi.org” (for example, “gammaomega@kkpsi.org”).

You must activate your account in order to use it. To activate it, simply e-mail [kkytbs@kkytbs.org](mailto:kkytbs@kkytbs.org) and inform them that you wish to activate your official chapter email account. You will be given instructions on how to activate it change the password as well as how to access the account via an existing email program or via a web browser. We suggest that the account be claimed by the Chapter President, although it can be claimed by any officer. We also strongly recommend that you create a new password for your

account. Once you have activated your e-mail account, please notify National Headquarters so that the address can be listed in the on-line Chapter Directory. You can use your existing e-mail application with this account. Be sure and record your password in a safe place so that future officers can access the account after your term of office expires!

## **NATIONAL PUBLICATION**

The PODIUM provides your chapter an opportunity to have your articles published in a national magazine. Articles worthy of publication are personality profiles, outstanding projects or activities, editorial comments and articles on specific topics related to the band member experience. Copy deadline dates are December 1 and May 1. The PODIUM is delivered to your chapter in a bulk shipment by UPS (United Parcel Service). UPS requires a physical address for delivery and cannot deliver to a US Postal Service box. Make sure you have a correct UPS mailing address on file at the National Headquarters to insure proper delivery. When The PODIUM is delivered to your chapter, PLEASE be sure that copies are distributed to all members.

## **CHAPTER AGENDA & MINUTES**

Chapter Presidents should create an agenda for every official meeting of the chapter. Create the minutes based on the basic agenda framework, and fill them in as the meeting progresses. Once the minutes have been read, voted upon, and accepted, place them in the chapter binder or some other permanent file for future reference. These do not need to be sent to the National Headquarters. More information can be found in the Procedures for Running Chapter Meetings section.

## **SUPPLIES**

Check your supply of materials provided by the National Headquarters. If you need any items, please notify your Treasurer so he/she may order them. Allow 2-3 weeks for delivery.

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# KAPPA KAPPA PSI PROCEDURE FOR RUNNING CHAPTER MEETINGS

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## PROCEDURE FOR RUNNING CHAPTER MEETINGS

Please refer to Appendix E for Parliamentary Procedure Guidelines

Per the National Constitution:

6.404 In general, the order of business of all chapter meetings shall be:

- a. Opening Ceremonies
- b. Reading of Minutes
- c. Report of Chapter Officers
- d. Unfinished Business
- e. New Business
- f. Report of Committees
- g. Closing Ceremonies

When deemed advisable, the general order of business may be changed by the Chapter President.

(N.B. These guidelines are very similar to those in Robert's Rules of Order.)

### **Some notes:**

Opening Ceremonies and Closing Ceremonies are what your Chapter chooses them to be. You can choose to use them, or not to use them at all. Please refer to the Kappa Kappa Psi Ritual and Ceremonies manual for a suggested Opening Ceremony and Closing Ceremony.

In this digital age, most meeting minutes would have been distributed digitally, read, and acknowledged by each Brother before you begin the next meeting. You'd only be left with voting to accept them.

The order of business, also referred to as a meeting agenda, optimally should be published for the Chapter to see for each meeting. If your chapter chooses to add in the information to be discussed for each section beforehand, that would be very beneficial for the Chapter Secretary and the keeping of the minutes for the meeting.

Chapter Meetings should not be long, drawn out events that take several hours. Planning ahead and strict time management are key to not taking valuable academic preparation time away from the Brothers. This is important practice for meeting planning in the world after graduation, where you can't keep going until you're escorted out of the building by Campus Security and have to finish the meeting on the lawn in the dark.

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# KAPPA KAPPA PSI CHARACTERISTICS OF A LEADER

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## CHARACTERISTICS OF A LEADER

Leadership defined: Leadership is the art of mobilizing others to want to struggle for shared aspirations. – *The Student Leadership Challenge* by Jim Kouzes and Barry Posner

What do we expect from leaders?		Why do we need leaders?	
Direction	Accountability	Efficiency	Control system
Knowledge	Risk taker	Accuracy	Organization
Fairness	Honesty	Promote consistency	Communication
Respect	Sensitivity	Promote teamwork	Integrity
Courage	Motivation	Motivation	Trust
Consistency	Credibility	Increase standards	Risk taker
Understanding	Listener	Effectiveness	Growth
Discipline	Vision		

### Characteristics of a Leader

Are you a leader?

<ul style="list-style-type: none"> <li>• Leaders are good teachers and great communicators.</li> <li>• Leaders have stamina.</li> <li>• Leaders do what they know is right, rather than what is popular.</li> <li>• Leaders are good at managing time.</li> <li>• Leaders do not condone incompetence, they replace it.</li> <li>• Leaders are reliable and open-minded.</li> <li>• Leaders are good listeners.</li> <li>• Leaders act with integrity.</li> <li>• Leaders inspire a vision.</li> <li>• Leaders live the fraternity's values and mission.</li> </ul>	<ul style="list-style-type: none"> <li>• Leaders are trustworthy and able to trust others.</li> <li>• Leaders subordinate their egos to the goals of the chapter.</li> <li>• Leaders know how to run meetings.</li> <li>• Leaders teach all members the basics of chapter operations.</li> <li>• Leaders help establish realistic goals and set action plans for reaching these goals.</li> <li>• Leaders successfully motivate members on the importance of reaching goals</li> <li>• Leaders recruit competent people.</li> </ul>
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*"I learned that a great leader is someone who has the ability to get other people to do what they don't want to do and like it." – Harry Truman*

### Spotting Leadership Potential

- Future leaders show initiative and can resolve issues with minimal supervision instead of waiting around for constant direction.
- Future leaders trust their own judgment and get on with the task at hand, taking responsibility and without fear of making mistakes.
- Future leaders are thirsty for knowledge and seek mentors and role models as they understand there is much to learn.
- Future leaders share their knowledge, recognizing that the more they give the more they receive in return. Knowledge hoarders do not make good leaders.
- Future leaders accept they are not perfect and do not know everything, that they have limitations and do not know and cannot do it all. They are not afraid to show weakness.
- Future leaders accept responsibility for their own mistakes. Taking ownership and taking risks increases the chance of error. Leaders admit, learn and move on without making excuses.
- Future leaders take responsibility and don't single people out or shift blame. Whilst any error is still acknowledged, it is 'ours' not the fault of an individual.
- Future leaders inspire and bring out the best in others as their passion and drive are contagious and set the standard for others to aspire to.

**Anyone who exhibits more than half of the traits listed above could be one of your emerging leaders and offered the training and development they need to maximize their capabilities.**

“It's a fine thing to have ability, but the ability to discover ability in others is the true test.”

-Elbert Hubbard

### **Life Management**

Student leaders are not only organization leaders but also students, spouses and friends. In short, there is more to student leaders' lives than the organizations they lead. A key to balancing all the different roles student leaders must take on requires effective use of their time. The following are some brief hints on how to make the most of your time and some suggested personal characteristics of good time managers.

**List your goals** | Start with long-term goals and then narrow down your short-term goals. Set your priorities, not only for your goals but the roles you must fulfill.

**Make a daily "to do" list** | Set your priorities every day. This keeps you on track with your short-term and long-term goals.

**Start with the "A's"** | Categorize your list into A, B and C groups, with A being the most important. Then take the items in the B group and redistribute them to the A and C groups. This way you end up with a list of only high and low priorities. However, be careful to not ignore C items; if they are forgotten about they can turn into urgent A priorities.

**Always ask yourself ...** | “What is the best use of my time right now?” Do this whenever you have a free moment.

**Handle each item just once** | If you pick up a piece of mail or receive a note, handle it then and there. Do not set it down before you resolve it, even if that means making a note to yourself to handle it later.

**Do it NOW** | Do not procrastinate. Remember every big project is just a lot of little projects put together. Take each element one at a time.

**Delegate** | Give tasks to other people so they can help.

### **Motivation**

How can one promote a higher level of intensity within the chapter? It's EASY; just follow these 5-steps:

- Strive to create a strong sense of belonging for everyone involved in the group; the members should feel as if they are honestly needed for whom they are.

- Foster discussion with the group to set clear and precise goals/objectives for the chapter and ensure progress is communicated and celebrated.
- Establish a definition of what is expected of each brother so they realize the expectations others have of them.
- Assign responsibilities challenging others within a range of abilities and interest. These should be responsibilities which contribute to reaching the goals/objectives.
- Observe the progress of the chapter toward completing the goals/objectives.

When motivating others, remember and understand their personal values may be different than yours. What makes sense to you may not make sense to them. By trying to see something from another person's point of view and empowering brothers to do what they are passionate about will help the brother and the chapter grow.

## **10 Thoughts About Leadership**

### **From Jon Gordon's *Soup***

1. **People follow the leader first and the leader's vision second** - It doesn't matter if the leader shares a powerful vision, if the leader is not someone who people will follow the vision will never be realized. As a leader, who you are makes a difference. The most important message you can share is yourself.
2. **Trust is the force that connects people to the leader and his/her vision** - Without trust there is a huge gap between the leader and the vision. Without trust people will stay off the bus. However if people trust the leader they will hop on the bus with the leader and help move the bus forward towards the vision.
3. **Leadership is not just about what you do but what you can inspire, encourage and empower others to do.**
4. **A leader brings out the best within others by sharing the best within themselves.**
5. **Just because you're driving the bus doesn't mean you have the right to run people over** - Abraham Lincoln said "Most anyone can stand adversity, but to test a man's character give him power." The more power you are granted the more it is your responsibility to serve, develop and empower others. When you help them grow they'll help you grow.
6. **"Rules without Relationship Leads to Rebellion"** - Andy Stanley said this and it's one of my favorite quotes. As a leader you can have all the rules you want but if you don't invest in your people and develop a relationship with them they will rebel. This applies amazingly to children as well. It's all about relationships.
7. **Lead with optimism, enthusiasm and positive energy, guard against pessimism and weed out negativity.**
8. **Great Leaders know they don't have all the answers** - Rather they build a team of people who either know the answers or will find them.
9. **Leaders inspire and teach their people to focus on solutions, not complaints.** (*The No Complaining Rule*)
10. **Great leaders know that success is a process not a destination** - One of my heroes, John Wooden, the legendary UCLA basketball coach, never focused on winning. He knew that winning was the by product of great leadership, teamwork, focus, commitment and execution of the fundamentals. As a leader focus on your people and process, not the outcome.

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# KAPPA KAPPA PSI NATIONAL ORGANIZATIONAL STRUCTURE

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## NATIONAL ORGANIZATIONAL STRUCTURE

### KAPPA KAPPA PSI NATIONAL HEADQUARTERS

*Stillwater Station – Stillwater, Oklahoma*

The services of the National Headquarters fall into four categories, all of which overlap: Administrative Services, Fiscal Management, Record Keeping, and Publicity and Promotion. The staff of the National Headquarters is accountable to the National Councils and Boards of Trustees of each organization, and through them to the National Chapter.

#### **For regular first class mail:**

Kappa Kappa Psi  
P.O. Box 849  
Stillwater, OK 74076-0849

#### **For USPS/UPS/FedEx Shipping:**

Kappa Kappa Psi  
401 E. 9<sup>th</sup> Ave.  
Stillwater, OK 74074-4704

#### **Phone**

(405) 372-2363 Office  
(405) 372-2333 Fax

**Where do I get help?** Always start with the [www.kkpsi.org](http://www.kkpsi.org) website. Several standard questions can be found there. If the question needs to be elevated to the next level, check with your Chapter Sponsor and/or Director of Bands, District Council, or your District Governors. They will be able to determine if you should bring your concern(s) to the National Headquarters Staff.

## NATIONAL HEADQUARTERS STAFF

National Executive Director | Steven Nelson | [nelson@kkytbs.org](mailto:nelson@kkytbs.org)

Contact [Steven](#) about Fraternity Policies & Procedures, Appealing late fees, Reporting Hazing, Issues with Sponsor/Director of Bands

National Headquarters Office Manager and Accountant | Diana Spiva | [hqna@kkytbs.org](mailto:hqna@kkytbs.org)

Contact [Diana](#) about: Your Chapter Tax EIN, Proof of Liability Insurance

National Membership Services Coordinator | Debbie Morris | [hqsec@kkytbs.org](mailto:hqsec@kkytbs.org)

Contact [Debbie](#) about: Membership Cards, Shingles, and Pins, Your Chapter's Monies on Account at National HQ, What Items are Needed/Missing on any Forms with Payment (CPR, CPU, IRF, HON)

National Alumni, Development, and Historical Coordinator | Aaron Moore | [hqacc@kkytbs.org](mailto:hqacc@kkytbs.org)

Contact [Aaron](#) about: Anything to do with the OMRS, Fraternity Policies and Procedures, Alumni Affairs, Fraternity History, Donations

National Chapter and Colony Education Coordinator | T. J. Tooley | [hqedu@kkytbs.org](mailto:hqedu@kkytbs.org)

Contact [T. J.](#) about: Chapter Constitutions, Chapter Road to Wisdom, Discipline Issues, Colonization, Fraternity Policy and Procedures

National Publications Manager and Multimedia Designer | Robert Bratcher |

[podium@kkytbs.org](mailto:podium@kkytbs.org)

Contact [Robert](#) about: The Podium, National Website, Social Media

National Chapter Field Representative 2018 - 2020 | Nicole Brooks | [kkycfr@kkytbs.org](mailto:kkycfr@kkytbs.org)

National Chapter Field Representative 2018 - 2020 | Justin Jensen | [cfrkky@kkytbs.org](mailto:cfrkky@kkytbs.org)

Contact [Justin](#) and/or [Nicole](#) about: Fraternity Policies & Procedures, Road to Wisdom, Chapter Constitutions, Fundraising, Service Project Ideas



## NATIONAL COUNCIL 2017-2019

All Members of the National Council shall serve without compensation. Expenses of each National Officer incurred on behalf of the Fraternity shall be paid by the Fraternity, upon presentation of a written statement approved by the National President and National Executive Director. Each National Officer shall have one vote at all meetings of the National Chapter and National Council. National Officers shall not be eligible to serve as chapter proxies at conventions. If a vacancy occurs in the office of the National President, the National Vice President for Colonization and Membership shall become National President. In this event, the Board of Trustees may appoint a National Vice President for Colonization and Membership. If a vacancy occurs in any of the other offices, the Board of Trustees shall appoint someone to finish out the term. Understanding the responsibilities for your National Officers is very important in the running of a local chapter. By understanding the different offices, a chapter can contact the right officer when a question arises that the chapter might need help from the National level to answer. The following are responsibilities of the different officers.

**National President | Evan Thompson | [evan@kkpsi.org](mailto:evan@kkpsi.org) |**

The National President shall be designated as the Executive Officer of the Fraternity and the National Chapter and the National Council. The National President shall be a member ex officio of all committees and shall sign all charters, shingles, contracts, and other instruments of business of the Fraternity. In addition, the National President shall appoint all committees, be a member of the Corporation's Board of Trustees, and shall further be designated as the official representative of the National Chapter, whenever such representation shall be required.

**National Vice President for Colonization & Membership | Marco Krcatovich | [mkrcatov@kkpsi.org](mailto:mkrcatov@kkpsi.org) |**

The National Vice President for Colonization and Membership shall, in the absence of the National President, preside at meetings on Colonization and Membership shall advance the purpose of the Fraternity as stated in the preamble of the National Constitution through colonization and membership. In addition, the National Vice President for Colonization and Membership shall work along with the National Council, District Officers, Governors, and the Chapter Field Representatives in the area of colonization and membership. The National Vice President for Colonization and Membership shall coordinate the activities of the Chapter Field Representative with the National Executive Director.

**National Vice President for Programs | Dr. Nicholas Bratcher | [nbratcher@kkpsi.org](mailto:nbratcher@kkpsi.org)**

The National Vice President for Programs shall promote and publicize the national programs of the Fraternity to the membership and the outside community. The National Vice President for Programs shall take minutes at National Conventions and National Council meetings, and publish them as needed.

**National Vice President for Student Affairs | Jessica Lee | [jessicalee@kkpsi.org](mailto:jessicalee@kkpsi.org)**

The National Vice President for Student Affairs shall be a regular member of the National Council and have all the rights and privileges thereof. The National Vice President for Student

Affairs shall attend all National Council meetings, be an able representative of the active student members of the Fraternity at all times, and shall be an Active Member or Life Member. The National Vice President for Student Affairs shall send to all of the district officers a summary of the National Council actions and meetings.

**National Vice President for Professional Relations | Dr. Douglas Stotter | [dstotter@uta.edu](mailto:dstotter@uta.edu)**

The National Vice President for Professional Relations shall serve as a liaison for Kappa Kappa Psi with the college band teaching profession. The National Vice President for Professional Relations must be chosen from the collegiate band profession. The National Vice President for Professional Relations shall be appointed by the National President with approval from the National Council and serve a term of two years.

**Immediate Past National President (ex-officio) | Jack Lee | [lee.jack.d@gmail.com](mailto:lee.jack.d@gmail.com)**

**Board of Trustees, Chair (ex-officio) | Adam Cantley | [adamcantley@kkpsi.org](mailto:adamcantley@kkpsi.org)**

**Kappa Kappa Psi Alumni Association Board of Directors Chair (ex-officio) | Daniel Miller | [maxxcash@hotmail.com](mailto:maxxcash@hotmail.com)**

## NATIONAL BOARD OF TRUSTEES 2017-2019

Kappa Kappa Psi is legally a corporation, incorporated under the laws of the Sovereign State of Oklahoma as of November 27, 1919. The Corporation, Kappa Kappa Psi, has jurisdiction over all the component parts of the Fraternity which are: (1) Corporation; (2) National Chapter; (3) Districts; (4) Chapters; (5) Kappa Kappa Psi Alumni Association.

The Board of Trustees shall consider all issues of national policy, alumni, public relations, legal matters and internal problems of the Fraternity, which are referred to it by the National Council. Except in matters determined by a Court of Law, the decision of the Board of Trustees is final. In any instance in which a component part fails to function at the national level, the Board of Trustees shall take steps necessary to return matters to normal.

The Corporation is represented by a Board of Trustees composed of seven members; five members at large, the Immediate Past President, and the National President (ex officio). Members of the Board of Trustees shall serve without compensation. A complete report of the activities of the Board of Trustees shall be presented at the convention of the National Chapter.

**Adam Cantley, Chair** | [adamcantley@kkpsi.org](mailto:adamcantley@kkpsi.org)

**Daniel George, Vice Chair** | [dannygeorge@kkpsi.org](mailto:dannygeorge@kkpsi.org)

**Dr. Malinda Matney** | [mmatney@umich.edu](mailto:mmatney@umich.edu)

**Eric Morson, Liaison to the KKPsiAA Board of Directors** | [easye1@aol.com](mailto:easye1@aol.com)

**Edward Savoy** | [edward.savoy@gmail.com](mailto:edward.savoy@gmail.com)

**Immediate Past National President | Jack Lee** | [lee.jack.d@gmail.com](mailto:lee.jack.d@gmail.com)

**National President (ex-officio) | Evan Thompson** | [evan@kkpsi.org](mailto:evan@kkpsi.org)

## KAPPA KAPPA PSI ALUMNI ASSOCIATION BOARD OF DIRECTORS 2017-2019

The Kappa Kappa Psi Alumni Association is dedicated to supporting the Fraternity. Recognizing that the college band experience should continue after graduation, the National Alumni Program will focus its efforts on connecting and enriching members from the past, present, and future of college and university bands; promoting lifelong involvement with band; and enhancing the long-term growth and financial viability of Kappa Kappa Psi.

The Kappa Kappa Psi Alumni Association is an opportunity for members to extend their fraternity activity by participating as alumni Brothers and is open to all alumni, life, and honorary members of the Fraternity. Members of the Alumni Association help offset costs of the Alumni Program, while annual dues and donations support alumni activities to ensure the Fraternity's continued ability to provide valuable experiences for all members following graduation.

The Alumni Association is administered by the Kappa Kappa Psi Alumni Board of Directors (AABOD). While members of the Alumni Association do not conduct business meetings as an assembled body, the Board of Directors discusses Alumni Association activities, directions, and goals with association members at conventions and other meetings to plan future alumni programs and events.

**Daniel Miller, Chair** | [maxxcash@hotmail.com](mailto:maxxcash@hotmail.com)

**Greg Boike, Outreach Chair** | [greg.boike@gmail.com](mailto:greg.boike@gmail.com)

**Brent Cannon, Traditions and Recognition Chair** | [brentcannon@yahoo.com](mailto:brentcannon@yahoo.com)

**Dr. Erin Cooper, Musicianship Director** | [cooperec@gmail.com](mailto:cooperec@gmail.com)

**Kelly Nellis, Membership Director** | [kellynellis@kkpsi.org](mailto:kellynellis@kkpsi.org)

**Jennifer Pitts-Taylor, Programming and Professional Development Director** | [pittstaylor@gmail.com](mailto:pittstaylor@gmail.com)

**Dr. Nicholas Rorrer, Local Alumni Association Director** | [nrorrer@gmail.com](mailto:nrorrer@gmail.com)

**Kate Rohrich, Communications Director** | [katerohrich1@gmail.com](mailto:katerohrich1@gmail.com)

**Eric Morson, Trustee Liaison to the KKPsiAA Board of Directors** | [easye1@aol.com](mailto:easye1@aol.com)

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# KAPPA KAPPA PSI DISTRICT ORGANIZATIONAL STRUCTURE

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## DISTRICT ORGANIZATIONAL STRUCTURE

Each District is under the jurisdiction of at least one District Governor; some Districts have more than one. District Governors are selected by the National Council. District Governors must be at least twenty five years of age and serve for a period of two years or from National Chapter Convention to National Chapter Convention. District Governors are the administrative officers of the District and are members ex officio of all district committees which the District President appoints. District Governors acts in an advisory capacity to the National Council, the District, and the individual chapters and communicates the advice of the National Council to the District and the Chapters in the District. District Governors are designated as the official representatives of their District whenever such representation is required and shall, when requested by the National Council, act as the official inspecting officer of the Fraternity at all Chapters within the District.

### Midwest District:

Dr. Anthony Falcone | [afalcone2@unl.edu](mailto:afalcone2@unl.edu)  
Denali Pearce-Alt | [denali529@scglobal.net](mailto:denali529@scglobal.net)

### North Central District:

Tammi Ramsey | [tammi@kkpsi.org](mailto:tammi@kkpsi.org)  
Marc Renaud | [mrenaud@kkpsi.org](mailto:mrenaud@kkpsi.org)

### Northeast District:

Marie Burleigh | [marie.burleigh@mail.wvu.edu](mailto:marie.burleigh@mail.wvu.edu)  
Michael Napolitano | [mnapolitano@kkpsi.org](mailto:mnapolitano@kkpsi.org)  
Bill Welch | [wbwelch67@gmail.com](mailto:wbwelch67@gmail.com)

### Southeast District:

Dr. Craig Aarhus | [caarhus@colled.msstate.edu](mailto:caarhus@colled.msstate.edu)  
Arupa Gopal | [agopal@kkpsi.org](mailto:agopal@kkpsi.org)  
Latrondrick Hunter | [lhunte6@gmail.com](mailto:lhunte6@gmail.com)

### Southwest District:

Toni Castle | [tonicastle@kkpsi.org](mailto:tonicastle@kkpsi.org)  
Andrew Melvin | [andrewbmelvin@gmail.com](mailto:andrewbmelvin@gmail.com)  
Clinton Wieden | [wieden@kkpsi.org](mailto:wieden@kkpsi.org)

### Western District:

Erik Marrs | [erikmarrs@kkpsi.org](mailto:erikmarrs@kkpsi.org)  
Charlene Ronne | [charleneronne@kkpsi.org](mailto:charleneronne@kkpsi.org)

The current Districts are named according to their geographic location within the U.S. and include an International District. Each District is governed by an elected corps of officers; each District also has appointed advisors, known as Governors within Kappa Kappa Psi and Counselors within Tau Beta Sigma.

Districts allow local chapters in a region to develop a closer relationship fostered through various District functions and an annual convention. Hosted by chapters within the District, these conventions allow chapters to generate programs and policies. Often, the ideas that are shared at District Conventions are then discussed on a national level.

In 1987, the Districts were realigned from the original ten numbered areas to seven. This was done in order to better facilitate District meetings and eliminate those Districts having only one or two active Chapters.

Each District has several officers, which may include: a District President, Vice President, Secretary-Treasurer, and Member at Large. At the discretion of the District, other officers may be elected or appointed. Refer to the District Constitution for any other District Officers. The chapters assembled in District Convention elect the District Officers. Each District Officer must be an Active or Associate member of the Fraternity at the time of election and for their entire term of office and must be enrolled in a declared or undeclared full time degree program at a college or

university for the entire academic year following election to district office. Each District Officer shall have more than ordinary business and professional ability and shall be capable of representing the Fraternity and District when called upon to do so. The officer shall have the best interests of the Fraternity at heart and be willing and able to devote the necessary time to the duties of office. The District Officers shall serve from District Convention to District Convention.



### Midwest District

Colorado  
Iowa  
Kansas  
Minnesota  
Missouri  
Montana  
Nebraska  
North Dakota  
South Dakota  
Wyoming

### Northeast District

Connecticut  
District of Columbia  
Delaware  
Maine  
Maryland  
Massachusetts  
New Hampshire  
New Jersey  
New York  
Pennsylvania  
Rhode Island

### Western District

Alaska  
Arizona  
California  
Idaho  
Hawaii  
Utah  
Washington  
Nevada  
Oregon

### North Central District

Illinois  
Indiana  
Kentucky  
Michigan  
Ohio  
Wisconsin

### Southwest District

Vermont  
Virginia  
West Virginia  
Arkansas  
Louisiana  
New Mexico  
Oklahoma  
Texas

### Southeast District

Alabama  
Florida  
Georgia  
Mississippi  
North Carolina  
South Carolina  
Tennessee

### International

All Chapters outside the United States.



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# APPENDICES

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## APPENDICES

Appendix A | Frequently Asked Questions

Appendix B | Glossary of Acronyms

Appendix C | Risk Management Policies of Kappa Kappa Psi

Appendix D | 2017-18 Insurance and Claims Manual

Appendix E | Parliamentary Procedures

Appendix F | Membership Statuses

Appendix G | Disciplinary Actions

Appendix H | National Award Programs and Scholarships

## APPENDIX A

### FREQUENTLY ASKED QUESTIONS

#### **What due dates do I need to know?**

Chapter Presidents are ultimately responsible for assuring that all reporting is submitted on time, though all Chapter Officers have the ability to create and submit reports for the Chapter in the Online Membership Reporting System (the OMRS).

For the 2017-2019 Biennium, the Chapter Personnel Report is due on September 30<sup>th</sup> (October 15<sup>th</sup> for late start or quarter-term schools), the Fall Activity Report is due on December 1<sup>st</sup>, the Chapter Summary Report is due on June 1<sup>st</sup>, and the Graduating Seniors Report is due each quarter/semester no later than 30 days after graduations have occurred.

#### **What if the chapter roster is inaccurate?**

Contact Aaron Moore at National HQ at [hqacc@kkytbs.org](mailto:hqacc@kkytbs.org). He can determine if there is something to be done on the National HQ side of the OMRS, or if research needs to be done to justify roster corrections.

#### **Can first-year students become Membership Candidates?**

Yes, but not until they have a term/semester of work completed with reported grades. Per the National Constitution:

6.503 A band member may be offered entry into the National Membership Education Program: The Road to Wisdom of the Fraternity after the satisfactory completion of one (1) term as a member of the college or university band unless exception is made by the Chapter Sponsor. The band member shall possess unusually good character and demonstrate leadership potential.

#### **What is the difference between Conditional and Inactive Status?**

Per the National Constitution:

6.511 **Conditional** status in the Fraternity may be requested by an active or associate member when that member cannot, without undue hardship, continue to meet the requirements for active or associate status, respectively. The request shall be in writing and shall state the specific reasons for requesting conditional status. To become effective, the member shall have paid national member dues for the current academic year. The request shall be approved by a majority vote of the chapter, with approval of the Sponsor/Director of Bands. Conditional status shall not be maintained for more than one (1) year. After one (1) year, a request must be submitted to maintain Conditional status.

6.512 **Conditional members** may, at the discretion of the local chapter, attend Chapter meetings, District and National Conventions and events, participate in Ritual, participate in chapter fundraisers and service projects and attend chapter social functions. Conditional members shall not hold office, propose candidates for membership, introduce business, vote on any matters, or act in the capacity of a big brother.

6.513 Former active or associate members who are enrolled in school but do not pay member dues shall be classified as **inactive** members. Inactive members have no privileges of Fraternity

membership. Inactive members may not participate in any Fraternity business, projects, or activities. To obtain privileges of membership, said member must request, in writing, reinstatement by the chapter from which the member became inactive. Upon review of the inactive member's written request, the inactive member must receive a favorable vote of seventy-five (75) percent of the eligible voting membership, the approval of the chapter sponsor, and payment of all financial obligations to both the chapter and the Fraternity in order to be granted privileges of membership.

**Who qualifies to be in Alumni status, and what activities are Alumni Brothers permitted to participate in on the Active Chapter level?**

Per the National Constitution:

6.514 Alumni members of the Fraternity shall be those Active, Associate or Conditional members of the Fraternity who have completed their education or who have terminated their affiliation with their college or university. In the event an alumni member wishes to reactivate with the respective chapter, said alumnus must be registered as a student, be an active member of the institution's band, and meet requirements as an active or associate member of the local chapter.

**N.B. Members can only become Alumni by one of the two ways described herein; a chapter cannot vote a member Alumni.**

6.515 At the discretion of the local Chapter, alumni members may have certain privileges which include but are not limited to: attending Chapter meetings, participating in Ritual, participating in Chapter fundraisers, and attending Chapter social functions. Such privileges may be limited, revised or revoked by the local chapter with approval of the Chapter Sponsor and Director of Bands. Alumni members shall not, at the Chapter or District level, hold office, propose candidates for membership, introduce business, vote on any matters, or act in the capacity of a big brother.

**Can a Brother resign from Kappa Kappa Psi, effectively rescinding his/her membership?**

No. Per the National Constitution:

6.526 Membership status in Kappa Kappa Psi may not be terminated by the member through resignation. However, as stated in 6.521, 6.522, and 6.525, a member may be suspended or expelled for due cause by the chapter of his/her affiliation.

## APPENDIX B

### GLOSSARY OF ACRONYMS

AGP: Alumni Giving Program, a monthly donation program benefitting the KKPsi Alumni Association and earns participants Life Memberships. Active, Alumni, Honorary, and Life Members can participate in the AGP.

CFR: Chapter Field Representative - also known as National Chapter Field Representative

CSR: Chapter Summary Report - the report in the OMRS that covers all activities from December 1<sup>st</sup> through May 31<sup>st</sup>

CPR: Chapter Personnel Report - the report in the OMRS that relays the current status for Brothers who paid dues the previous year to National HQ

CPU: Chapter Personnel Update – the report in the OMRS that is used to report status changes made after the CPR is submitted in the Fall semester

FAR: Fall Activity Report – the report in the OMRS that covers all activities from June 1<sup>st</sup> through December 1<sup>st</sup>

GSR: Graduating Seniors Report – the report filed after each commencement on your campus reflecting all Brothers who have terminated their affiliation with your college/university by graduation

HON: Honorary Initiate Form – the form in the OMRS used to report Brothers initiated as Honoraries into your chapter

IRF: Initiate Registration Form – the form in the OMRS used to report who has begun The Road to Wisdom in your chapter, and then subsequently completed the program through Initiation

MEP: Membership Education Program, now known as The Road to Wisdom

MCR: Membership Candidate Registration,  
also referred to as Candidate Registration & Risk Management Policy Form

NHQ: National Headquarters

NVPCM: National Vice President for Colonization and Membership

NVPP: National Vice President for Programs

NVPPR: National Vice President for Professional Relations

NVPSA: National Vice President for Student Affairs

NXD: National Executive Director

OCU: Officer and Chapter Update - the report in the OMRS that reports election results to National HQ

## APPENDIX C

### RISK MANAGEMENT POLICIES

### OF KAPPA KAPPA PSI

#### POLICY ON HAZING

No chapter, colony, student member, membership candidate or alumnus of Kappa Kappa Psi or Tau Beta Sigma shall conduct nor condone hazing activities. Permission or approval by a person being hazed is not a defense.

Hazing activities are defined as:

“Any action taken or situation created that produces mental or physical harm, discomfort, embarrassment, harassment, or ridicule. Such activities may include but are not limited to the following: use of alcohol, paddling in any form, line ups for the purpose of intimidation, creation of excessive fatigue, physical and psychological shocks, quests, treasure hunts, scavenger hunts, unnecessary road trips, wearing of public apparel which is conspicuous and not normally in good taste, engaging in public stunts and buffoonery, morally degrading or humiliating games and activities, and any other activities which are not consistent with academic or musical achievement; Kappa Kappa Psi/Tau Beta Sigma law, ritual or policy; or the regulations and policies of the educational institution, band program, or applicable state law.”

The chapter shall hold a hazing workshop prior to First Degree. This workshop will inform prospective members of the hazing policy, the chapter membership education program, and a line of communication to follow if the prospective members feel hazing may be occurring. A recommendation for the line of communication is to first contact someone in the prospective member's chapter (i.e. chapter vice president in charge of the Road to Wisdom or big sibling, etc.), followed by the sponsor and director of bands, then the district governor or counselor. The National Headquarters will be made aware of any reports of hazing and will act appropriately. The chapter should understand that their charter will be revoked if hazing is found to be occurring.

#### REPORT HAZING AND OTHER ISSUES

Any form of hazing is dangerous and illegal! Kappa Kappa Psi strictly prohibits hazing in any fashion. To eliminate the risk to Membership Candidates and to the Fraternity itself, we strongly request the personal involvement of all Brothers to report any suspected hazing activities. Should you know of or suspect activities by any chapter that could be construed as hazing the following information is for you!

If you wish to speak directly to someone, please call 405-372-2333 to speak with a member of the National Headquarters Staff. Keep in mind, our office is open from 8:00am to 5:00pm CENTRAL time, but you are welcome to leave a message at any time. Your identity will be kept confidential. We don't need your name, we just need your information.

Hazing is detrimental to the welfare of the Fraternity; therefore, all reports are taken seriously and are followed up on by the appropriate officials. PLEASE report activities to your Chapter

Sponsor, Director of Bands, or Fraternity Leadership. Never attempt to handle situations on your own.

Kappa Kappa Psi has created a simple form for you to provide as much information as possible. Go to <http://www.kkpsi.org/resources/report-a-problem/>. We will look into any report alleging hazing activities, even if we do not have the name of the individual who provides us with the information. However, it is extremely difficult, if not impossible, to verify a report of hazing without some form of contact with the individual(s) reporting the incident(s). For those reasons, we do request you provide us with the following contact information. Again, we will keep your identity confidential at your request.

### Hazing Prevention

When organizations are challenged to eliminate hazing practices, some members are often resistant to this change. In many cases, those who are most vocal against eliminating hazing are those who are upset about the hazing they themselves endured (but don't admit this publicly) and expect others should be "abused" as well in order to gain "true" membership in the group just like they did.

Of course, if you try to eliminate hazing in your chapter, you will likely encounter many elaborate reasons for why this will be devastating for your group. While there will be some staunch supporters of the status quo, there will be many who can be convinced of the negative effects and potential risks of hazing. Believers in the supposed "benefits" of hazing may be more likely to change their opinion if they can envision some alternatives.

The following are supposed benefits hazers believe they accomplish and some alternatives you can instill in your chapter that will accomplish the same goal:

- Foster unity:
- Brother retreat.
- Visit a ropes course to work on group cohesiveness, communication and leadership skills.
- Non drinking socials to learn about each other.
- Develop problem-solving abilities:
- Have discussions about chapter weaknesses such as poor recruitment, apathy and poor scholarship, and develop solutions the chapter might then adopt (i.e. create a business plan).
- Teaches you to work under stress:
- Prepare a challenging fundraiser and see it through to the end.
- Have an interview workshop to prepare you better for tough interviews.
- Develop leadership skills:
- Encourage participation in school/campus activities outside of the chapter.
- Encourage new members to get involved in committees and/or leadership roles.
- Develop a peer mentor program within your group for leadership roles.
- Invite school/community/business leaders into the chapter to share their experiences.
- Instill a sense of membership:
- Start new traditions ~ it only takes a few academic terms for it to become a tradition.



## POLICY ON ALCOHOL AND CONTROLLED SUBSTANCES

Recognizing its responsibility for the social well-being and welfare of its members; and with the objective that the social atmosphere and environment of its chapters be one in harmony with the spirit and ideas of these fraternal organizations; Kappa Kappa Psi Fraternity and Tau Beta Sigma Sorority adopt this policy related to fraternity and sorority events.

[Social Event Third Party Vendor Checklist](#) | [STAR Program](#)

1. The possession, sale, use, or consumption of ALCOHOLIC BEVERAGES during a Kappa Kappa Psi or Tau Beta Sigma event, in any situation sponsored or endorsed by the chapter, or at any event an observer would associate with the organization(s) must be in compliance with any and all applicable laws of the state, province, county, city, institution of higher education, and band program and must comply with the Social Event Third Party Vendor Checklist. [Download Checklist here]
2. No alcoholic beverages may be purchased through or with Kappa Kappa Psi or Tau Beta Sigma funds, nor may the purchase of alcohol for members or guests be undertaken or coordinated by any member in the name of or on behalf of the chapter (i.e. pass the hat or collection). The purchase or use of a bulk quantity or common source(s) of alcoholic beverage (i.e. kegs, cases, or open bars) is prohibited. Also, Kappa Kappa Psi or Tau Beta Sigma chapters are prohibited from hosting BYOB events.
3. OPEN PARTIES, meaning those with unrestricted access by non-members of the fraternity or sorority, without specific invitation, where alcohol is present, are prohibited. All social events with alcohol must have an enforced guest list.
4. No members, collectively or individually, shall purchase for, serve to, or sell alcoholic beverages to any minor (i.e., those under legal drinking age).
5. The possession, sale, or use of any ILLEGAL DRUGS or CONTROLLED SUBSTANCES during any Kappa Kappa Psi or Tau Beta Sigma event or at any event that an observer would associate with the organization(s) is strictly prohibited.
6. Kappa Kappa Psi or Tau Beta Sigma chapters may not have any alcoholic beverages at any chapter business meeting or service event. Chapters may not provide alcohol for any fundraising event. Chapters may not promote any non-Kappa Kappa Psi or Tau Beta Sigma event where alcohol is being provided or uses alcohol as an incentive to promote any events. This includes using social events/parties as fundraisers where alcohol is present.
7. No chapter(s) of Kappa Kappa Psi or Tau Beta Sigma may co-sponsor an event with a tavern (tavern defined as an establishment generating more than one-half of annual gross sales from alcohol) at which alcohol is given away, sold, or otherwise provided to those present. This includes any event held in, at, or on the property of a tavern as defined above for purposes of fundraising. However, the chapter(s) may rent or use a room or area in a tavern as defined above for a closed event held within the provisions of this policy, including the use of a third party vendor and guest list. An event at which alcohol is present may be conducted or co-sponsored with a charitable organization if the event is held within the provisions of this policy.
8. No chapter(s) of Kappa Kappa Psi or Tau Beta Sigma may co-sponsor, co-finance, attend, or participate in a function at which alcohol is purchased by any of the host chapters, groups, or organizations.
9. All recruitment activities or new member events associated with any chapter(s) of Kappa

Kappa Psi or Tau Beta Sigma will be non-alcoholic. No recruitment activities or new member events associated with any chapter may be held at or in conjunction with a tavern, as defined in this policy.

10. No member or prospective member/membership candidate shall permit, tolerate, encourage, or participate in “drinking games.” The definition of drinking games includes but is not limited to the consumption of shots of alcohol, liquor, or alcoholic beverages; the practice of consuming shots equating to one’s age; “beer pong;” “century club;” “dares;” or any other activity involving the consumption of alcohol which involves duress or encouragement related to the rapid consumption of alcohol.

11. No alcohol shall be present at any prospective member/membership candidate activity or ritual of the chapter. This includes but is not limited to activities associated with “bid night,” “big brother – little brother” events or activities / “big sister – little sister” events or activities, “family” events, or initiation.

### **POLICY AGAINST DISCRIMINATION**

The Kappa Kappa Psi Fraternity and the Tau Beta Sigma Sorority expressly prohibit discrimination by any component part of the Fraternity or Sorority or by any person acting on behalf of the organizations on the basis of race, ethnicity, color, national origin, sex, ability status, religion, age, marital status, veteran status, gender identity or expression, or sexual orientation.

### **POLICY ON MEMBERSHIP CANDIDATE TERMINOLOGY**

At the 1991 National Conventions of Kappa Kappa Psi and Tau Beta Sigma, the national Chapters decided to no longer recognize the word “pledge” or any form thereof as a term to refer to the prospective members of the Membership Education Program. The decision was made at the same time that the Membership Education Programs of the Fraternity and Sorority were revised to promote the positive education of all prospective members throughout the process. In doing so, information within the programs that had any negative connotation suggesting hazing was removed, including any references to the word “pledge.” It is therefore imperative to remove any references to the word “pledge” from all chapter documents, including Membership Education Programs, Constitutions, and any other handbooks on policies and procedures in order to fully comply with the current standards of the National Organizations.

### **POLICY ON SEXUAL MISCONDUCT**

Kappa Kappa Psi and Tau Beta Sigma do not tolerate or condone any form of sexual misconduct on the part of its members, whether physical, mental or emotional. This includes any actions, activities or events, whether on university premises or off-site locations, which are demeaning to a person regardless of their sex or gender expression, including but not limited to verbal harassment, sexual discrimination, and sexual assault.

Chapters and members will operate in such a manner as to exhibit respect, care, and concern. No chapter or any member should encourage, support, or participate in any action which in any manner demeans, belittles, or damages another person.

A chapter will not tolerate or condone any form of sexist or sexually abusive behavior on the part of its members, whether physical, mental, or emotional. This includes any actions that are

demeaning to an individual, ranging from assault to harassment or the objectification of individuals.

A chapter will not sponsor or participate in any activity, including competitive games, community service, or philanthropic endeavors, activities associated with recruitment, social events, or events that are abusive or demeaning or could be perceived to be abusive or demeaning to others.

All chapters will educate its members on this policy each year as part of its review of all Risk Management Policies.

What is sexual misconduct?

Sexual misconduct encompasses unwanted or unwelcome conduct of a sexual nature. Anyone can be a victim or perpetrator of sexual misconduct, regardless of their sex, sexual orientation or gender expression. Sexual misconduct can involve conduct that occurs on campus, off-campus, or via electronic means, including online, by social media, or by text. Sexual misconduct may include, but may not be limited to, the following:

Adverse treatment of an individual, including ridicule, based on sex, gender, or gender expression, rather than individual merit.

Unwelcome verbal, nonverbal or physical conduct of a sexual nature. This can occur in a context of relationship of unequal power.

Physical sexual acts committed when consent is not received, a person is physically forced, intimidated or coerced into a sexual act, or when a person is physically or mentally unable to give consent. Consent must be freely given. Consent must be the presences of “yes” not the absence of a “no.” Finally, someone who is has consumed alcohol or is intoxicated is not able to give clear consent.

Engaging in a course of conduct directed at a specific person that would cause a reasonable person to fear for their safety or the safety of others or suffer emotional distress. Sexual Misconduct can manifest in a variety of behaviors and it exists on a continuum.

Verbal abuse or sexist behavior may include but is not limited to:

whistling

humor and jokes about sex or individual specific traits

suggestive or insulting sounds

sexual innuendoes about your or someone else's personal appearance

sexual innuendoes about your or someone else's sexual activities

demands for sexual favors accompanied by implied or overt threats

Physical abuse may include but is not limited to:

any inappropriate touching, pinching or patting

brushing against someone else's body

Sexual acts without the consent of the other party

Sexual acts when the other party is physically or mentally unable to give consent

### **STANCE ON BRANDING/SCARIFICATION**

Branding/Scarification is the modification of the human body through burning, cutting or other types of abrasion to the human skin and other areas. Branding/Scarification has increased risk of infection, slow healing third degree burns, internal injury, unintended permanent disfiguring deformities, and other medical issues. It is seen as causing “physical harm and discomfort” or providing a “physical shock” as outlined in the hazing policy.

The practice of Branding/Scarification or other forms of body modification that are associated with Kappa Kappa Psi/Tau Beta Sigma in an unlicensed environment are “not consistent with academic or musical achievement; Kappa Kappa Psi/Tau Beta Sigma law, ritual or policy; or the regulations and policies of the educational institution, band program, or applicable state law.”

Consequently, those who engage in the act of branding/scarification or other forms of modification in relation to Kappa Kappa Psi/Tau Beta Sigma could be found in violation of Kappa Kappa Psi/Tau Beta Sigma policy and are subject to action from the National Council. This includes forced or coerced body modification at licensed establishments. Always remember that willingness to consent to behavior is not a defense for hazing.

### **CONVENTION ATTENDANCE POLICY**

As Kappa Kappa Psi and Tau Beta Sigma have moved forward, both organizations have had to confront the realities of risk management. Among those realities is the need to make sure that everyone who takes part in the offerings of our active organizations must be sharing in the cost of insurance, and registering as a participant who follows our policies, just as our active members must do for their participation. From this point forward, for all six districts’ conventions and the National Convention, alumni attending conventions must have either a Life Membership or a current National Kappa Kappa Psi Alumni Association or National Tau Beta Sigma Alumni Association membership.

### **GUIDELINES ON MEMBER PRESENTATION SHOWS**

In order for Kappa Kappa Psi and Tau Beta Sigma to assist chapters with the membership process and to avoid potential problems, all chapters who engage in membership presentation shows (probate shows), regardless of the membership status of the members, must adhere to the following guidelines when presenting members. These guidelines must be followed for the performance and rehearsal of any member presentation show. Please remember that these shows should reflect the mission, values, and policies of Kappa Kappa Psi/Tau Beta Sigma.

All Presentation Shows (Probates) must happen in accordance with proper University, Band Program and National Organization Policy and Regulations. Please contact your University Office of Student Affairs or Dean of Students Office to confirm your local campus and university policies prior to the execution of the probate.

The Director of Bands or Chapter Sponsor must approve the show material and must be in attendance.

Presentation of members must take place no more than thirty (30) calendar days after the

members have been initiated into the organization or in accordance with your local university/college policy.

If the presentation of members includes a need for space reservations, the local chapter must coordinate with appropriate campus offices and follow all university policies for organizing such an event. This includes, but is not limited to, space/venue reservations, sound restrictions, and other local university policies.

All participants should not be forced to participate and must freely agree to participate in the probate.

The show attire worn by the participants should not impede the ability of the participant to move, breathe, or see. (i.e., including the wearing of masks).

There will be no vulgarity, sexual explicit material, or profanity. This includes, but is not limited to, inappropriate attire, sexually suggestive moves, cursing, profane gestures, or any material that is not in line with values of Kappa Kappa Psi/Tau Beta Sigma.

There will be no verbal attacks, whether intentional or not (i.e. dissing, calling out or slamming), on another individual or organization. This is not in line with values of Kappa Kappa Psi/Tau Beta Sigma.

All alcoholic beverages and controlled substance laws/policies of Kappa Kappa Psi/Tau Beta Sigma, the state, province, county, city, institution of higher education, and band program must be followed during the event.

All portions of the show must be in line with the National Hazing Policy of Kappa Kappa Psi/Tau Beta Sigma. No abuse will be tolerated. This includes, but is not limited to, verbal abuse, emotional abuse, slapping, kicking, spitting, punching, poking, caning, etc. (canes, paddles, staffs, sticks, etc. may be used as part of the performance, but may not be used as a weapon to harm another individual.)

In the event of a fight or physical altercation during the presentation, those involved will be removed immediately, University Police will be contacted, and the students involved will be referred to the proper university office for disciplinary action. If a member of the presenting organization is involved, the presentation will be stopped immediately. Any issues should be reported immediately to the Director of Bands/Sponsor.

The duration of the presentation will be no longer than one (1) hour total. The presenting organization will be responsible for ensuring the site used is left in its original condition after use.

Chapters are encouraged to send drafts of proposed Membership Presentation Shows (probates) to their District Governors/Counselors and/or the National Council for review prior to the execution of the probate to ensure that the show adheres to this policy and to the Kappa Kappa Psi/Tau Beta Sigma Hazing Policy.

### POLICY ON AFFILIATE GROUPS

It has been brought to the attention of the National Councils and the National Headquarters that some chapters have established affiliate groups who are unrecognized by Kappa Kappa Psi and Tau Beta Sigma yet act in the name of the fraternity and/or sorority. These groups, known as Love Notes, sweethearts, MIKKY Clubs, Tau Gents, and the like, have been educated and initiated by chapter's members in the name of the fraternity and/or sorority. Yet the fraternity and/or sorority do not recognize these members in any way.

Kappa Kappa Psi and Tau Beta Sigma strictly prohibit this activity. Allowing these groups to operate in the name of the fraternity and/or sorority puts the National Organizations at significant risk. Chapters who continue this practice will be subject to disciplinary action and could be dropped from the active roster.

In summary, any chapter currently using these affiliate groups should have these groups cease their activities immediately. The National Councils or National Headquarters should be immediately notified of any known instances of these affiliate groups.

If you have questions or concerns regarding the national policies of Kappa Kappa Psi, please contact the National Headquarters or National Council.

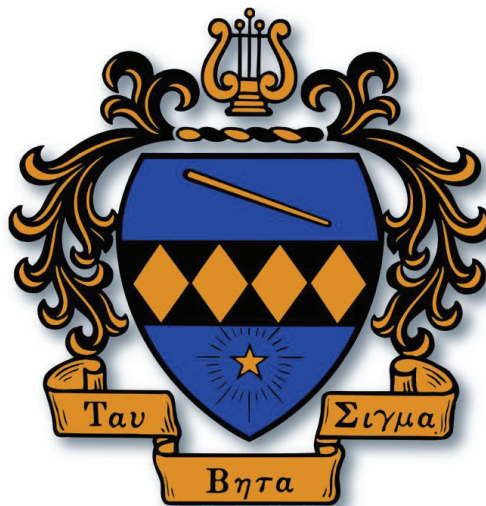


APPENDIX D  
GENERAL LIABILITY INSURANCE



KAPPA KAPPA PSI/TAU BETA SIGMA NATIONAL  
HONORARY BAND  
FRATERNITY & SORORITY

2017 - 2018 INSURANCE & CLAIMS MANUAL



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## INTRODUCTION

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The purpose of this manual is to give you an understanding of insurance coverage provided and information to properly report all actual and potential liability claims with which you may become involved.

The final responsibility for the success of the insurance program rests with Kappa Kappa Psi/Tau Beta Sigma and the Chapter. It is always important to remember that our first line of defense in liability matters is loss prevention, next is loss control, and the insurance contract is the final line of defense. The undergraduate and alumni members' willingness to understand and assume the responsibility of sound risk management practices is a cornerstone of our program.

In the event that an incident or claim does arise, the Executive Director of Kappa Kappa Psi/Tau Beta Sigma and Holmes Murphy will oversee the effective handling of all incident and claim investigation. Included within this manual you will find an incident reporting form that must be completed and submitted at the time of any incident that results in bodily injury or property damage.

Holmes Murphy strives to provide risk management resources to compliment the loss prevention and control efforts of its clients. Please visit [www.holmesmurphyfraternal.com](http://www.holmesmurphyfraternal.com) to review the Holmes Murphy website. You will find a number of risk management resources that can assist you in your daily lives as well as information on your insurance protection, as well as online forms for; purchasing property coverage, liability and property claim reporting and making requests for additional insured protection.

## KAPPA KAPPA PSI/TAU BETA SIGMA THE GENERAL LIABILITY INSURANCE PROGRAM

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The following description is a summary only and is not intended to serve as a substitute for the actual insurance contract.

Kappa Kappa Psi/Tau Beta Sigma insurance program provides Blanket Public General Liability Coverage of **\$100,000 per occurrence** with a **\$200,000 general aggregate** per location for all participating chapters. (Types of coverage are included at the end of this section).

The coverage is for bodily injury, property damage and personal injury. This protects the local undergraduate chapter, its officers and members, alumni associations, and chapter related educational foundations including appointed volunteers, from claims arising out of bodily injury and property damage occurring out of chapter operations. It also protects against claims arising out of libel, slander, false arrest, invasion of privacy, eviction from the premises, and consumption of food and beverages and incidental malpractice.

It must be understood that our coverage is for general public liability. **It is not accident insurance covering members and membership selection candidate for injuries sustained on the chapter premises and/or in chapter activities.** Liability insurance is not a substitute for medical insurance. Furthermore, it is not Workers' Compensation insurance which may be required for Fraternity employees.

Primary Insurer:	Admiral Insurance
Policy Period:	September 1, 2017 to September 1, 2018
Policy Number:	CA000019980-04

*Kappa Kappa Psi/Tau Beta Sigma Coverage includes:*

1. **COMMERCIAL GENERAL LIABILITY**  
Covers liability arising out of Fraternity premises and operations.
2. **PRODUCTS/COMPLETED OPERATIONS LIABILITY**  
Covers preparation and consumption of food and beverages.
3. **PERSONAL INJURY & ADVERTISING INJURY**  
Covers libel, slander, defamation of character, false arrest, detention, malicious prosecution, wrongful entry or eviction, invasion of privacy.
4. **CONTRACTUAL LIABILITY COVERAGE**  
Under certain circumstances, the liability coverage of Kappa Kappa Psi/Tau Beta Sigma insurance contract is extended to protect other parties with whom a Kappa Kappa Psi/Tau Beta Sigma chapter may enter into a contractual agreement. No contract should be signed by any entity/chapter of Kappa Kappa Psi/Tau Beta Sigma, without complete understanding of liabilities being assumed and insurance coverage, if any, that is provided. When any questions

arise, please contact your chapter advisor or the National Headquarters of Kappa Kappa Psi/Tau Beta Sigma.

**5. WATERCRAFT LIABILITY**

Covers hired and non-owned boats/watercraft providing it is less than 26 feet in length.

**6. INCIDENTAL MEDICAL MALPRACTICE**

Covers liability that arises against an insured chapter or an individual who provides emergency medical care for injuries on or off our premises.

**7. DAMAGE TO PREMISES YOU RENT**

\$50,000 damage to premises you rent. This is not a substitute for property insurance. Damage to premises you rent liability coverage provides coverage for liability arising against your Fraternity out of fire damage to a non-owned premises rented for any period of time as well as other damage to a premises you rent for 7 or less days.

**8. WORLDWIDE COVERAGE**

Coverage worldwide for suits brought in the United States.

**9. HOST LIQUOR LIABILITY**

Provides coverage when providing alcoholic beverages at no charge to those of legal drinking age. If you are found to be in the practice of manufacturing, distributing, selling, serving or furnishing alcoholic beverages, or if minors are involved, your coverage and protection is jeopardized.

**10. HIRED AND NON-OWNED AUTOMOBILE**

This applies to the situation when a chapter member, chapter employee, or volunteer alumnus driving his own car on Kappa Kappa Psi/Tau Beta Sigma business is involved in an accident. It is intended to only cover entities of Kappa Kappa Psi/Tau Beta Sigma and individuals not involved in the accident. The intent is not to provide auto liability coverage to those who are not prudent enough to purchase their own auto liability policy. The auto insurance of the driver or auto owner will be the primary insurance coverage.

### Limits of Coverage

General Liability:

\$100,000 Bodily injury & property damage Combined Single Limit.

\$200,000 Policy Aggregate per location/chapter

\$2,500 Deductible per occurrence

Who is an insured?

The insurance coverage will pay claims up to \$100,000 per occurrence for the following organizations and/or people:

- A. The local undergraduate chapter that is chartered and recognized by the Fraternity **when it obeys the laws** of the institution, city, county, state and country in which it operates and the policies of Kappa Kappa Psi/Tau Beta Sigma. Undergraduate chapter officers,

executive committee, committee chairman and members while performing the duties of elected or appointed positions within the organization.

- B. All volunteer advisors while performing the duties of their appointed or elected positions.
- C. Alumni Associations and chapter related educational foundations, its officers, and appointed volunteers while performing the services of their positions.

Who is *not* an insured under this policy?

- A. Any individual member, alumni, trustee or advisor who is performing tasks outside of his responsibility (i.e. spontaneous social function planned by an individual member, chapter advisor consuming alcohol with undergraduates, hazing of members, etc...)
- B. Any member whose illegal or intentional actions result in death or injury to an individual or property damage.
- C. Members' parents or family members and guests of chapter members.
- D. College/University administration (see Adding Additional Insureds below).

#### Adding Additional Insureds

Additional Insureds may be added to this policy. Such Additional Insureds may be your landlord, college, university and/or proprietor from whom the chapter may be renting property for a special event.

Please submit the Additional Insured Request Form on page 14 to: Kappa Kappa Psi/Tau Beta Sigma, 401 East 9<sup>th</sup> Ave., Stillwater, OK 74074, Phone: 405.372.2333, fax: 405.372.2363 or email: [hqna@kkytbs.org](mailto:hqna@kkytbs.org), at least (30) thirty days prior to the date it is needed.

Upon review and approval of the Additional Insured request by Kappa Kappa Psi/Tau Beta Sigma and the insurance carrier, a certificate of insurance will be issued by Holmes Murphy, with the original forwarded to the Additional Insured and a copy to the National Headquarters.

**Proper function planning is critical to completing any Special Event in a safe manner! Please utilize the enclosed Special Event Checklist to assist with your event planning.**

What Does Our Coverage *Not* Include?

- A. Violations of Risk Management Policy - There is no Duty to Defend, nor any insurance coverage provided by this policy for any Insured who supervises or directs others to participate, observe and/or participate in the excluded act, and the Insured entity to which they belong, for a claim arising out of or resulting from any violation of the National Fraternity's Risk Management Policy.

"Violation" will be determined in the sole discretion of the Chief Executive Officer of the National Fraternity or legal authority that some breach of the Risk Management Policy has occurred.

"Risk Management Policy" is the written rules, regulations, or policies regarding risk management in effect at the time of the occurrence established by the National Fraternity or its Local Chapter.

- B. Any claim of bodily injury and/or property damage from an incident resulting when:
1. An illegal act was committed.
  2. An intentional act was committed.
  3. A contract made by the chapter is broken.
  4. There is any discharge, release or escape of smoke, vapors, soot, fume, acids, toxic chemicals, upon land, the atmosphere or any water course or body of water.
  5. An employee is hurt on the job. Workers' Compensation coverage must be purchased.
- C. Any claim of property damage to property owned by, rented by, used by, or cared for by the chapter. For example, the chapter rents a portable generator for an outdoor function, and while it is in the care, custody and control of the chapter, it is damaged and the lesser holds the chapter responsible and liable. No coverage is available under Kappa Kappa Psi/Tau Beta Sigma liability insurance contract. The only exception would be a premise rented for 7 or less days in which the "\$50,000 Damage to Premises You Rent" limit would apply.

### Legal and Illegal Activity

Simply stated, no insurance policy in the world provides coverage for violations of the law. Kappa Kappa Psi/Tau Beta Sigma insurance program is no exception to this rule. The key points to understand are:

- Compliance with federal, state, local and institutional (college or university) laws and regulations is required.
- Compliance with all regulations and policies of Kappa Kappa Psi/Tau Beta Sigma is required.

Those individuals who choose to violate these rules may void the protection for themselves under Kappa Kappa Psi/Tau Beta Sigma insurance program. Every effort has been made to avoid their actions from jeopardizing the other members, other entities, or other named insureds protected by Kappa Kappa Psi/Tau Beta Sigma program. The following brief examples are intended to provide illustration and do not represent legal advice.

- A. With the broad awareness of its membership, the chapter serves alcohol to a minor in violation of the law at a chapter sponsored function. In the event of an injury, claim or lawsuit, those persons found to be in violation of the law and/or Kappa Kappa Psi/Tau Beta Sigma (in this case the entire chapter) most likely would be without insurance protection. The other named insureds would be protected (i.e. National Fraternity, or volunteer alumni).
- B. Two of the members of a 65-person chapter cause injury to someone in connection with a hazing incident. This activity was unauthorized and done secretly without the knowledge of the chapter, and strictly against chapter policy. In the event of an injury, claim or lawsuit, those persons (in this case, the two members) found to be in violation of the law and Kappa Kappa Psi/Tau Beta Sigma would be without insurance protection. The chapter, its officers and other volunteers would be protected.

Great effort has been made to ensure coverage will be provided to those individuals and entities exposed to claims. Its intent is to provide coverage for claims that arise from ordinary negligence. Chapters and

chapter officers are protected from the unauthorized actions of individuals. Chapter advisors are protected from the unauthorized actions of their individual chapter members and the chapter as a whole, as are the chapter foundations and all other appointed alumni volunteers involved with the Fraternity.

All questions regarding insurance interpretation and coverage should be directed to: Holmes Murphy

Senior Client Service Consultant: Trude Smouse

13810 FNB Parkway, Suite 300

Omaha, NE 68154

Phone: 800.736.4327 Ext.4163

Fax: 800.328.0522 or

E-Mail: [tsmouse@holmesmurphy.com](mailto:tsmouse@holmesmurphy.com)

## SPECIAL EVENTS

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In general, Special Events sponsored by a Chapter are covered under the general liability policy.

Poorly planned Special Events (e.g. social functions) are the usual cause of injury to our members and their guests. Proper planning is critical to the success of the event, avoiding injuries and controlling the costs of insurance protection.

We encourage alumni and other volunteers be engaged with the undergraduate chapters in the proper planning of Special Events. A Special Event Application is included on page 12, if the form is utilized and all sections are addressed the guidance provided by the Checklist can do a great deal to help avoid an injury from occurring.

### Special Note:

Whenever chapters or members are transporting special event attendees, **personal vehicles should not be used**. Chapters should be encouraged to engage a licensed third party transportation vendor who will provide professional drivers. The transportation company assumes liability during the ride and removes the responsibility and risk from Kappa Kappa Psi/Tau Beta Sigma.

## SAFE TRANSPORTATION RECOMMENDATION FOR CHAPTER FUNCTIONS

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Liability exposure continues to be one the biggest challenges facing men's & women's general fraternal organizations. In fact, the exposure threatens the continued existence of many organizations. Kappa Kappa Psi/Tau Beta Sigma recognizes this and is attempting to provide the broadest general liability coverage available to us; however, we cannot do it without the support of the entire organization. It is important that sound risk management practices endorsed at the National level are

implemented and strictly followed at the chapter level.

The safe use of automobiles is critical to the well-being of all Kappa Kappa Psi/Tau Beta Sigma members.

Effective immediately, we request each local chapter and/or colony implement a policy eliminating the use of:

1. Members' vehicles for transportation of members and guests from fraternity functions in programs such as the designated driver.
2. Leased or rented vehicles operated by members to transport members and guest from fraternity functions.

We understand that each of the above referenced precautions is done with the best intentions, however, for numerous reasons they have not produced the intended results. The only acceptable and safe alternative is using professional transportation services.

Outlined below is one of many examples of how a good intention can turn into a tragedy:

A local chapter of a national fraternity in Oregon held an off-premise social event. In an effort to provide a safe and fun environment, the chapter rented a 15 passenger van to transport members and guests to and from the location of the event. During one of the return trips, the sober member who was driving the van lost control and struck a telephone pole. The result was one passenger fatally injured and one seriously injured. Litigation soon followed and, ultimately, a substantial settlement was paid out on the claim.

From the description of the measures taken it would appear that everything was done correctly. What went wrong?

- The driver of the vehicle was unfamiliar with the van. Think about the times you jumped into a friend or family member's vehicle and searched for the lights switch, the air conditioning controls or how to dim the lights
- The driver was not a professional driver; while he might have been sober, his passengers were not. Dealing with the distraction of passengers can be difficult, even for professional drivers.

Because of situations such as this, we are requesting only professional drivers and transportation be utilized. This is just one example. Unfortunately, we could fill page after page with similar tragedies. We recommend the following requirements for any selected vendor employed to provide transportation to members and guest:

- Commercial Auto Insurance that provides coverage for transporting people and property for a fee.
- Commercial Auto Insurance that provides, at a minimum, primary coverage of \$1,000,000 combined single limit for bodily injury and property damage.
- A professional driver who has a valid commercial vehicle operator's license in the state in which the driver is located.

The standards set forth should be addressed in both a formal undergraduate chapter business meeting. By working together to consistently meet these standards, we will be providing safe transportation that all previous measures had failed to accomplish and, together, we will be reducing the exposure to our brothers, chapters and the National Fraternity. This is an ultimate win-win situation we all want to achieve.

## LAWSUITS

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There will be occasions when lawsuits may be served on a member of your chapter. As there is only a limited time to answer a lawsuit, the following procedure applies:

- a. Treat any potential or actual claim or lawsuit as a high priority item and immediately notify National Headquarters by phone.
- b. Utilizing the enclosed incident reporting form, note all relevant information.
- c. Forward the suit or incident report to Kappa Kappa Psi/Tau Beta Sigma, PO Box 849, Stillwater OK 74076, via overnight delivery, or [email: nelson@kkytbs.org](mailto:nelson@kkytbs.org). It is very important the claim or lawsuit be sent immediately.

## GENERAL LIABILITY CLAIMS

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General Liability claims can be numerous and usually arise out of activities of a chapter which cause bodily injury, property damage or personal injury to an individual. They will more than likely involve damage or injury to someone other than an employee or an officer of the Fraternity.

While on the scene, if possible, get names, addresses and phone numbers of all parties involved, as well as any witnesses to the accident. Immediately complete the attached incident reporting form and submit.

What should be reported?

Report bodily injury of anyone other than an employee and any property damage for which there is the



possibility a claim may be made against Kappa Kappa Psi/Tau Beta Sigma. Complete the enclosed incident reporting form which will provide the needed information regarding the claim. If you question whether to report a potential claim, *report it!*

It is imperative all losses or incidents be reported immediately to Kappa Kappa Psi/Tau Beta Sigma (see phone numbers and addresses below). The National Executive Director of Kappa Kappa Psi/Tau Beta Sigma is responsible for providing the initial report of the claim to Holmes Murphy (see phone numbers and addresses below). Once the claim report is sent to Holmes Murphy you will likely be contacted directly by them or an insurance company representative to discuss the incident. If you are unable to obtain all necessary details when first notified of any incident, still report any known facts.

Success or failure of Kappa Kappa Psi/Tau Beta Sigma, insurance program and our ability to obtain reasonably priced insurance is contingent upon accurate and timely reporting. It is incumbent upon you as a member of Kappa Kappa Psi/Tau Beta Sigma to report all known facts regarding bodily injury, property damage, or personal injury arising out of Kappa Kappa Psi/Tau Beta Sigma activities in a timely manner.

### Kappa Kappa Psi/Tau Beta Sigma *INCIDENT/CLAIM REPORTING*

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Kappa Kappa Psi/Tau Beta  
Sigma

Executive Director, Steve  
Nelson PO Box 849  
Stillwater, OK 74076  
Phone: 405.372.2333  
E-mail: [nelson@kkytbs.org](mailto:nelson@kkytbs.org)

Holmes Murphy

ATTN: MK

Mashek Claim

Specialist

13810 FNB Parkway, Suite 300

Omaha, NE 68154

Phone: 800.736.4327 ext. 5500

Fax: 800.328.0522

[mmashek@holmesmurphy.com](mailto:mmashek@holmesmurphy.com) or

[www.holmesmurphyFraternity.com](http://www.holmesmurphyFraternity.com)

*Alternate:* Rob Meraz, Client Advocacy,  
ext. 4189

## OTHER INSURANCE COVERAGE

**Directors' & Officers' Liability Coverage**

The National Insurance Program of Kappa Kappa Psi/ Tau Beta Sigma offers Directors' and Officers' Coverage to all Undergraduate Chapters, and Alumni Associations. Directors' and Officers' Coverage protects all Directors, Officers, Volunteers and the Entity for claims arising out of the failure or negligence in carrying out your fiduciary duties of diligence, obedience and loyalty to the organization that you serve as a Director and/or Officer. Claims covered under a Directors' and Officers' Liability Contract are claims for financial injury and not bodily injury or property damage of a third party that are insured by the General Liability Coverage of Kappa Kappa Psi/ Tau Beta Sigma. In addition, the Directors' and Officers' Liability Coverage of the Sorority provides Employment Practices Liability Coverage that protects the Undergraduate Chapter, House Corporations, and Alumni Associations from claims arising out of allegations of Discrimination, Harassment or Wrongful Termination arising in a employer/employee relationship. These claims are not insured by the General Liability or Workers' Compensation Coverage of the Chapter/Alumni and Volunteer Corporations.

Overview of the coverage is as follows;

Insurance Carrier:	RSUI Indemnity Company
Policy Term:	September 01, 2015 to September 01,
2018 Policy Number:	NHP664407
Limit of Coverage:	\$1,000,000 Policy Aggregate
Retention/Deductible:	\$20,000 Each and Every Loss for the Fraternity & Sorority

Note: Only one Retention/Deductible will need to be satisfied for a claim involving both the Fraternity, Sorority and any Undergraduate Chapter, House Corporations, and Alumni Associations.

Note: Please make certain to report any potential claim immediately as the D&O policy is a claims-made policy. Also, according to the provisions of the Directors & Officers Liability policy, defense cost incurred by the insured or settlements made without the prior written consent of the Insurer will NOT be covered under the policy. If defense counsel is hired by an insured without prior approval from the insurance carrier, there is no guarantee all charged fees will be paid as part of the claim.

# APPENDIX

## KAPPA KAPPA PSI/TAU BETA SIGMA INCIDENT/CLAIM REPORTING FORM

When an incident arises at the chapter causing bodily injury or property damage to any person, this report must be completed thoroughly and submitted immediately to the following contacts:

If the bodily injury is of a serious nature, a **telephone call** to Steve Nelson at 405.372.2333 must be made.

Chapter Name: \_\_\_\_\_ Date of Incident: \_\_\_\_\_

Address: \_\_\_\_\_ Injured Party: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ IP Address: \_\_\_\_\_

Phone #: \_\_\_\_\_ IP City, State, Zip: \_\_\_\_\_

Chapter President: \_\_\_\_\_ IP Phone #: \_\_\_\_\_

Chapter Advisor: \_\_\_\_\_ CA Address: \_\_\_\_\_

CA Phone #: \_\_\_\_\_

Witnesses & Phone #'s:

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Did Incident Happen Off Premises? (Leased or Rented) Yes or No

If yes, Owner's Name \_\_\_\_\_ Owner's Phone #: \_\_\_\_\_

Owner's Address: \_\_\_\_\_

Police Investigation? Yes or No

Name of Agency & Case #: \_\_\_\_\_

Description of Injury & Where Was Injured Party Taken:

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Description of What Happened (What, When, Where, How):

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Form Completed by (Name, Title, Telephone #, E-mail Address):

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Please utilize the back side of this form if you should run short of room.

**Kappa Kappa Psi/Tau Beta Sigma Special Events Application**

Date: \_\_\_\_\_  
 Chapter Name: \_\_\_\_\_  
 University Affiliation: \_\_\_\_\_  
 Chapter Address: \_\_\_\_\_  
 Attention: \_\_\_\_\_  
 City: \_\_\_\_\_  
 State: \_\_\_\_\_  
 Zip: \_\_\_\_\_  
 Phone number: \_\_\_\_\_  
 Fax number: \_\_\_\_\_  
 Event Date: \_\_\_\_\_  
 \_\_\_\_\_

Event Time: \_\_\_\_\_ to \_\_\_\_\_

Admission Charge: Circle one: Yes/No

If yes, amount \$ \_\_\_\_\_

Description of Event (type of event, name of performers, etc.):

\_\_\_\_\_  
 \_\_\_\_\_

Name of Venue: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone number: \_\_\_\_\_

Fax number: \_\_\_\_\_

Venue Capacity: \_\_\_\_\_

Estimated Daily Attendance: \_\_\_\_\_

Estimated Total Attendance: \_\_\_\_\_

Venue additional insured wording (found in rental agreement): \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Special Events Applications (con't)**

Do you need to name anyone else as an additional insured (check your contracts) -

If yes, please list: \_\_\_\_\_  
 \_\_\_\_\_

Seating type (bleachers, folding, permanent or temporary): \_\_\_\_\_

If temporary seating: Copy of contract for installation and removal along with certificate of insurance with \$ 1,000,000 general liability limit must be submitted listing Kappa Kappa Psi/ Tau Beta Sigma organization executing contract and Kappa Kappa Psi/Tau Beta Sigma as an “Additional Insured”.

Reserved or General Admission: Circle one: Reserved/General Admission Type and number of security (uniform, peer group, ushers, etc.):

Note: Security should be in ratio of 1 security members to 100 attendees

Who is supplying security: \_\_\_\_\_

(If outside firm, they must have certificate of insurance with \$1,000,000 general liability limit must be submitted listing KKP/TBS organization executing contract and Kappa Kappa Psi/Tau Beta Sigma, as an “Additional Insured”.)

Describe first aid/ medical arrangements: \_\_\_\_\_

Are you responsible for parking: Circle one: Yes/No Is

lot attended: Circle one: Yes/No

Will alcohol be sold: Circle one: Yes/No

Alcohol sold by whom: \_\_\_\_\_

If alcohol will be sold the company providing the alcohol needs to have a certificate of insurance form issued with \$1,000,000 general liability limit shown, as well as specifying liquor liability coverage of \$1,000,000 and it must be submitted listing KKP/TBS organization executing contract and Kappa Kappa Psi/ Tau Beta Sigma as an “Additional Insured”

Describe procedures/ safeguards for preventing the serving of alcohol to minors and intoxicated persons: \_\_\_\_\_

Fax or Mail completed form to:

Kappa Kappa Psi/Tau Beta Sigma ATTN: Steve  
Nelson  
Executive Director PO  
Box 849  
Stillwater, OK 74076  
405.372.2363 - Fax

**KAPPA KAPPA PSI/TAU BETA SIGMA**  
**ADDITIONAL INSURED REQUEST FORM**

Include the following information:

Chapter Name: \_\_\_\_\_

Your Name: \_\_\_\_\_

Your address : \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

Fax (if available): \_\_\_\_\_

Additional Insured's Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

Date and Time of Event: \_\_\_\_\_

Description: \_\_\_\_\_

Fax or Mail completed form to:

Kappa Kappa Psi/Tau Beta Sigma

ATTN: Steve Nelson

Executive Director

401 East 9<sup>th</sup> Ave.

Stillwater, OK 74074

405.372.2333 Phone 405.372.2363 Fax

[nelson@kkytbs.org](mailto:nelson@kkytbs.org)

The following questions are taken from the second page of the Special Event Checklist. Please answer the below questions and if any answer is "Yes" please include the documentation with this request;

- |   |                        |     |    |                |
|---|------------------------|-----|----|----------------|
| 1) Are Certificates of Insurance obtained from vendors?                                     |                        |     |    |                |
| A.  | Liquor Legal Liability | Yes | No | Not Applicable |
| B.  | General Liability      | Yes | No | Not Applicable |
| 2) Has vendor(s) provided proof of liquor license and temporary license to see on premises? |                        |     |    |                |
|   |                        | Yes | No | Not Applicable |
| 3) Is the sorority named as an additional insured on all certificates from vendors?         |                        |     |    |                |
|   |                        | Yes | No | Not Applicable |
| 4) Have applicable permits and permission been obtained from authorities:                   |                        |     |    |                |
| A.  | College/University     | Yes | No | Not Applicable |
| B.  | Fundraiser             | Yes | No | Not Applicable |

5) Has any written contract or agreement been signed for any part of this special event?\*

Yes

No

Not Applicable

6) Have you received any correspondence requesting proof of insurance for the event?

Yes

No

Not Applicable

*Please utilize the back side of this form if you should run short of room.*

### **Kappa Kappa Psi Fraternity**

#### *Waiver, Release of Liability and Indemnification*

In exchange for you being allowed to participate in \_\_\_\_\_ Chapter of Kappa Kappa Psi Fraternity's \_\_\_\_\_ (herein "activity"), I, (being at least 18 years old (strike if inapplicable), agree to be bound by each of the following:

#### **Assumption of Risk.**

I assume all risks, known and unknown, in any way connected with my participation in the Activity.

#### **Waiver and Release.**

I waive and release Kappa Kappa Psi Fraternity, the Chapter identified above, any affiliated organizations of either of the foregoing and their respective directors, officers, employees, agents, and volunteers (collectively, the "Fraternity Parties"), from all claims that I may have for any liability, injury, loss, or damage in any way connected with my participation in the Activity, including but not limited to any injury or loss caused in whole or in part by the negligence or misconduct of any of the Fraternity Parties.

#### **Indemnification.**

I agree to indemnify and hold harmless (in other words reimburse and be responsible for) the Fraternity Parties from all claims, liability, loss, damages, costs, and expenses in any way connected with omissions of my guests or invitees, including but not limited to any injury or loss caused in whole or part by the negligence or other misconduct of any of the Fraternity Parties.



Miscellaneous.

This instrument shall be binding upon my heirs and/or personal representatives and shall inure to the benefit of the Fraternity Parties and their respective heirs, personal representatives, successors, and assigns. If any provision of this instrument is held to be invalid or unenforceable, this instrument shall be construed as if such invalid or unenforceable provision was not contained herein.

Applicable Law.

In view of the fact that the Fraternity's national headquarters is located in Oklahoma, and in order to provide certainty in the law to be applied to the construction and enforcement of this instrument, this instrument shall be construed and enforced in accordance with the law of the State of Oklahoma.

*I have read this waiver, release of liability and indemnification. I understand that I have given up substantial rights by signing it. I am signing this waiver, release of liability and indemnification voluntarily.*

Printed name: \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_

If the person participating in the Activity is not yet 18 years old, the signature of a parent or legal guardian is required.

*As a parent or legal guardian of the above-named person, I permit the above-named person to participate in the Activity upon subject to all terms and provisions of this waiver, Release of Liability and Indemnification.*

Parent of Legal Guardian (print): \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_



# DEFINITIONS

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**Certificate of Liability Insurance:** This is a certificate issued by the insurance company detailing the particulars of the insurance coverage in place for all chapters and regions under the general liability policy. This certificate may be used to document the existence of coverages for chapters and regions. This document is not sufficient when a third party requests a certificate where they are named as an additional insured.

**Certificate of Liability Insurance for an Additional Insured:** This is a certificate issued by the insurance company detailing the particulars of the insurance coverage in place for all chapters and regions under the general liability policy. This document specifically identifies a third party as being expressly covered under the general liability policy for a specified period of time (i.e. an additional insured). This form of insurance certificate is often requested by facilities where chapters or regions are planning to hold events.

**Special Event:** Events other than those where Fraternity business is the primary purpose of the meeting are considered Special Events. In general, all special events are covered under the general liability policy. However, there are specific events that have been deemed to be high risk. When these sorts of events are planned by chapters, approval from the National Headquarters must be sought 30 days prior to the event date (See special events section in the manual on page 6.).

**General Liability Insurance:** Coverage that pertains, for the most part, to claims arising out of the insured's liability for injuries or damage caused by ownership of property, manufacturing operations, contracting operations, sale or distribution of products, and the operation of machinery, as well as professional services.

**Directors' & Officers' Liability Insurance:** Offers directors and officers protection from personal liability and financial loss arising out of wrongful acts committed or allegedly committed in their capacity as officers and/or directors.

**Aggregate Limit:** A limit in an insurance policy stipulating the most it will pay for all covered losses sustained during a specified period of time, usually one year. Aggregate limits are commonly included in liability policies and apply per chapter location.

**Occurrence:** An accident, including continuous or repeated exposure to substantially the same general, harmful conditions.

**Claim:** An incident where the injured party is making a demand for compensation under the terms of an insurance contract.

**Incident:** An occurrence involving bodily injury to a member or guest that does not result in a formal claim. All incidents must be reported when discovered due to possibility of them becoming a claim

**Bodily Injury:** Injury to the body, sickness or disease sustained by a person, including death resulting from any of these at any time

**Property Damage:** Physical injury to tangible property, including all resulting loss of use of that property. All such loss of use shall be deemed to occur at the time of the physical injury that caused it; or loss of use of tangible property that is not physically injured. All such loss of use shall be deemed to occur at the time of the “occurrence” that caused it.

## APPENDIX E

### PARLIAMENTARY PROCEDURES

Basic Principle: Minority is heard but majority rules

#### **Establish a quorum**

A quorum is the number of people who must be present to take legal action on business matters and is essential to conducting business meetings. The quorum is stipulated in the constitution, and before any business is discussed, the President should establish for the record that a quorum exists.

#### **All members have equal rights**

These include the right to make motions, debate, and vote. You need a two-thirds majority vote to deprive members of basic rights — such as closing or limiting debate and closing nominations. No member may be forced to vote, silence gives consent.

#### **General business — majority of those present**

Debate, decorum, and order

Only one main motion (one subject) may be considered at a time, and only one person may speak at a time. Anyone who wishes to make a motion should first be recognized by the President and preface the motion with the words, “I move that.” If someone wishes to second the motion, that person does not have to wait to be recognized but merely calls out, “I second the motion.” Without a second motion, the President moves on to the next agenda item. After the motion has been made and seconded, the President restates the motion, which is termed a main motion. Discussion begins. To ensure order and that only one person speaks at a time, the President recognizes members before they may speak. There must be an opportunity for at least one pro and one con for each motion and amendment. Technically, after a second is made, a motion cannot be withdrawn (not efficient to enforce).

#### **Amendments**

The purpose of an amendment is to change a motion already under consideration. If a member believes the right topic is being discussed but wants to modify the wording of the motion, he or she calls for an amendment. Technically, a motion may be amended, and the amendment to the motion may be amended, but no further amendments may be made. Amendments are motions, and as such, they require a second and full debate. Amendments can slightly change the main motion. Typically, if the author of the original motion agrees with the amendment it can be accepted as a “Friendly Amendment” and incorporated into the original motion without the need for debate or a vote.

#### **Closing Debate**

A member who wishes to end debate may interrupt discussion and say “I move/call the previous question.” This motion requires a second and must receive a two-thirds majority vote. Should it receive a two-thirds majority, the President then states, “The previous question has been called, all those in favor of the motion to...”

**How to Run a Meeting**

- Decide how strict to be with parliamentary procedure — generally, the larger the group, the more strict you should be.
- How will one be recognized to speak? — typically by raising your hand then being called upon by the President. Large assemblies may have fixed microphones where lines are formed to speak.
- President controls flow of meeting.
- Must appear unbiased, can never state an opinion on the motion before or during debate.

**To be effective, President must control flow of meeting by:**

- Quickly and decisively granting permission to speak.
- Always watching that comments are being made at the appropriate times (a pro should be a pro, not a public service announcement; points of information should be questions not pros/cons). Always stop someone and ask him or her to explain his/her point if it sounds like the granted time is being appropriately used (if it sounds like someone is making a con during a point of information).
- Quickly and decisively making judgments on points of order.
- Prompt for actions if meeting slows down (President will entertain motion to— such as close debate, open a window, consider “X”).
- Don’t be afraid to take a recess if you need to clarify points or get some information.
- Be quick to keep people in order (not speaking out of turn).
- Don’t let debate get personal — name-calling is not allowed (try to get people to speak in the third person when referring to other people in the room and to address actions not people).
- Use other resources — Warden, Parliamentarian, etc.

**Efficiency Tips**

- Most motions can be voted on by acclamation (general consent).
- Use voice vote for motions. President’s ruling stands on results of voice vote unless “call for division” is called for, then vote count is needed.
- President cannot make motions but can offer to “entertain” a motion which may fix a particular sticking point in debate.
- If President doesn’t know the answer to a “point of information,” he or she can call on someone else to answer it.

**Potential Problems**

- Noisy individual — warning from President then Parliamentarian removes.
- Bad environment (hot, cold) — President can recess meeting to try remedy the situation.
- People speaking without being recognized — reminder from President to wait to

be recognized, if doesn't work, warning from President then Parliamentary removes.

- Debate lasting too long — “without objection, President ends debate after two or more pro/cons.” (Two of the same back-to-back.)
- Meeting lasting too long — “without objection, President rearranges agenda and will postpone consideration of certain items until next meeting.”
- Everyone wants to speak — in the order they raise their hands, a list is made, chair simply calls names off this list.

*Adopted from Parliamentary Procedure: A Few Rules Help Keeps Order, by Kathy Gill*

“Entrepreneur Larry Wilson defined the difference between passion and drive as the difference between expressing yourself and proving yourself.”

*On Becoming a Leader by Warren G. Bennis*

## Parliamentary Procedures At A Glance

To Do This: (1)	You Say This:	May You Interrupt Speaker?	Must You Be Seconded?	Is the Motion Debatable?	Is the Motion Amendable?	What Vote Is Required?
Adjourn the meeting (before all business is complete)	"I move that we adjourn."	May not interrupt speaker	Must be seconded	Not debatable	Not amendable	Majority vote
Recess the meeting	"I move that we recess until..."	May not interrupt speaker	Must be seconded	Not debatable	Amendable	Majority vote
Complain about noise, room temperature, etc.	"Point of privilege."	May interrupt speaker	No second needed	Not debatable (2)	Not amendable	None (3)
Suspend further consideration of something	"I move we table it."	May not interrupt speaker	Must be seconded	Not debatable	Not amendable	Majority vote
End debate	"I move the previous question."	May not interrupt speaker	Must be seconded	Not debatable	Not amendable	Two-thirds vote
Postpone consideration of something	"I move we postpone this matter until..."	May not interrupt speaker	Must be seconded	Debatable	Amendable	Majority vote
Have something studied further	"I move we refer this matter to a committee."	May not interrupt speaker	Must be seconded	Debatable	Amendable	Majority vote
Amend a motion	"I move that this motion be amended by..."	May not interrupt speaker	Must be seconded	Debatable	Amendable	Majority vote
Introduce business (a primary motion)	"I move that..."	May not interrupt speaker	Must be seconded	Debatable	Amendable	Majority vote

### Notes

- These motions or points are listed in established order of precedence. When any one of them is pending, you may not introduce another that's listed below it. But you may introduce another that's listed above it.
- In this case, any resulting motion is debatable.
- Chair decides.



### Parliamentary Procedures At A Glance (continued)

To Do This: (4)	You Say This:	May You Interrupt Speaker?	Must You Be Seconded?	Is the Motion Debatable?	Is the Motion Amendable?	What Vote Is Required?
Object to procedure or to a personal affront	"Point of order."	May interrupt the speaker	No second needed	Not debatable	Not amendable	None (3)
Request information	"Point of information."	If urgent, may interrupt speaker	No second needed	Not debatable	Not amendable	None
Ask for a vote by actual count to verify a voice count	"I call for a division of the house."	May not interrupt speaker (5)	No second needed	Not debatable	Not amendable	None unless someone objects (6)
Object to considering some undiplomatic or improper matter	"I object to consideration of this question."	May interrupt speaker	No second needed	Not debatable	Not amendable	Two-thirds vote required
Take up a matter previously tabled	"I move we take from the table..."	May not interrupt speaker	Must be seconded	Not debatable	Not amendable	Majority required
Reconsider something already disposed of	"I move we now (or later) reconsider our action relative to..."	May interrupt speaker	Must be seconded	Debatable if original motion is debatable	Not amendable	Majority required
Consider something out of its scheduled order	"I move we suspend the rules and consider..."	May not interrupt speaker	Must be seconded	Not debatable	Not amendable	Two-thirds vote required
Vote on a ruling by the chair	"I appeal the chair's decision."	May interrupt speaker	Must be seconded	Debatable	Not amendable	Majority in the negative required to reverse chair's decision

#### Notes

4. The motions, points and proposals have no established order of precedence. Any of them may be introduced at any time except when the meeting is considering one of the top three matters listed in the chart (motion to adjourn, motion to recess, point of privilege).
5. But division must be called for before another motion is started.
6. Then majority vote is required.

## APPENDIX F

### KAPPA KAPPA PSI MEMBERSHIP STATUSES

Kappa Kappa Psi has only seven membership statuses: Active, Associate, Conditional, Inactive, Alumni, Life, and Honorary Membership. The following definitions are derived from the Kappa Kappa Psi National Constitution. They are not verbatim. Please read over these membership statuses and educate the Chapter members and Membership Candidates. Make sure that your Chapter Constitution does not conflict with the meanings below.

**ACTIVE** members of the Fraternity shall be registered students and members of the college or university band program who have been formally initiated after the completion of the Membership Education Program of the Fraternity. All annual dues and fees must be paid up to date to maintain active membership in the Fraternity. It shall be the duty of each active member to attend all meetings; to pay promptly all financial obligations; to become acquainted with the National, District, and Chapter Constitutions; to understand the history of Kappa Kappa Psi; and to support the efforts and purposes of the Chapter and Fraternity.

**ASSOCIATE** membership shall be granted to members of Tau Beta Sigma who have transferred to a college or university which does not have an active Tau Beta Sigma chapter, and who meet the transfer requirements as defined in the Kappa Kappa Psi Transfer Policy. Before becoming eligible for Associate membership conditional status shall be granted for a period not to exceed thirty (30) days, during which the member shall enter an orientation- period to become familiar with the principles of Kappa Kappa Psi and the operations of the local chapter. At the end of the orientation period, the member may request Associate status. Associate members shall have all the rights, privileges, and responsibilities- associated with Active membership.

**CONDITIONAL** status in the Fraternity may be requested by an active member- when that member cannot, without undue hardship, continue to meet the requirements for active status. The request shall be in writing and shall state the specific reasons for requesting conditional status. To become effective, the member shall have paid national member dues for the current academic year. The request shall be approved by a majority vote of the chapter, with approval of the sponsor/director of bands. Conditional status shall not be maintained for more than one (1) year. Conditional members may, at the discretion of the local chapter, attend Chapter meetings, District and National Conventions and events, participate in Ritual, participate in chapter fundraisers and service projects and attend chapter social functions. Conditional members shall not hold office, propose candidates for membership, introduce business, vote on any matters, or act in the capacity of a big brother. The chapter cannot request or force a member to take Conditional status.

**INACTIVE** members are former active members who are enrolled in school but do not

pay member dues. Inactive members have no privileges of Fraternity membership. Inactive members may not participate in any Fraternity business, projects, or activities. To return to active status, said member must request in writing of the local chapter. Upon approval by the local chapter and sponsor, and payment of all financial obligations to the National Headquarters and the local chapter, said member shall be returned to active status. If a member pays dues and then does not participate, the chapter cannot vote them Inactive. This status is only for non-dues paying members.

ALUMNI members of the Fraternity shall be those Active, Associate, or Conditional members of the Fraternity who have completed their education or who have terminated their affiliation with their college or university. Any alumni member shall have all privileges of an active member, except those of voting and introducing business. In the event an alumni member wishes to reactivate with the respective chapter, said alumnus must be registered- as a student, be an active member of the institution's band, and meet requirements as an active member of the local chapter. *Members can only become Alumni by one of the two ways described herein; a chapter cannot vote a member Alumni.*

LIFE Membership, along with privileges of such, shall be granted to any Alumni member upon payment of a Life Membership contribution, the amount to be set by the National Chapter, along with an application to the National Headquarters. The privileges of a Life Member include:

A lifetime membership in the Kappa Kappa Psi Alumni Association.

A life subscription to *The PODIUM*.

Discounts offered by the National Headquarters on selected merchandise or events. (to be announced as they occur)

Eligibility for appointments as deemed necessary by the National Council.

All privileges granted by the National Constitution.

\$500/lifetime

HONORARY members of the Fraternity shall possess the same general qualifications- as active members except that they shall not necessarily be regularly- enrolled in the college or university where the chapter is located nor possess any qualifications as musicians. They shall be generally recognized as outstanding in their field of endeavor or shall have performed outstanding service for the college or university band or Fraternity. Honorary members are eligible to purchase Life Membership in the Fraternity without further- obligations. Fee: \$50/lifetime

## **APPENDIX G**

### **DISCIPLINARY ACTIONS**

**PROBATION** – Upon due cause, a member of the Fraternity may be placed on probation following a favorable vote on the motion of seventy-five (75) percent of the chapter's eligible voting membership and approval by the chapter sponsor. A member placed on probation shall be informed, in writing, of the following: the reasons for probation; a specified time period in which to make restitution; and the obligations needed to be fulfilled within that time period. Chapters must notify the National Vice President for Colonization and Membership and the National Executive Director immediately. Fulfillment of all obligations within the specified time period shall return said member to previous membership status. Fulfillment of all obligations shall be approved by the chapter and sponsor. Failure to complete all obligations is just cause for either an extension of the probationary term or for the initiation of suspension proceedings.

**SUSPENSION** – Upon due cause, a member of the Fraternity may be suspended following a favorable vote of seventy-five (75) percent of the chapter's eligible voting membership and approval from the chapter sponsor. Suspended members may not participate in any Fraternity business, projects, or activities. A member placed on suspension shall be informed, in writing, of the following; the reasons for suspension, a specified time period in which to make restitution, and the obligations needed to be fulfilled within that time period. Fulfillment of all obligations within the specified time period shall return said member to previous membership status. Fulfillment of all obligations shall be approved by the chapter and sponsor. Failure to complete all obligations is just cause for either an extension of the suspension term or for the initiation of expulsion proceedings.

**EXPULSION** – Upon due cause, a member of the Fraternity may be expelled following a favorable vote of seventy-five (75) percent of the chapter's eligible voting membership and approval of the chapter sponsor. Such expulsion must conform to the rules and regulations of the local institution involved. The member will be given a hearing before the said motion is voted on. The vote will be a secret ballot, and the member will be informed of the vote totals. Having been expelled, the member shall return to the chapter all regalia and property of the Fraternity being held, and the name shall be stricken from the Master Chapter Roster at the National Headquarters.

## APPENDIX H

### NATIONAL AWARD PROGRAMS AND SCHOLARSHIPS

#### AEA SCHOLARSHIP

Recognizing that the college experience is shaped by a great number of factors (including academics and extracurricular activities), the Kappa Kappa Psi AEA Scholarship was designed to reward those students who strive for the highest in everything they do. Being in a fraternity requires a substantial time commitment. In addition, Brothers of Kappa Kappa Psi participate in a wide variety of musical ensembles and service projects. Kappa Kappa Psi is an organization that recognizes the role extracurricular activities provide for college students. The Fraternity recognizes the importance of academic excellence. Therefore, eligible applicants represent the best of Kappa Kappa Psi, by balancing academics and extracurricular activities and should be looked to as role models.

Eligible applicants for the AEA Scholarship must meet the following criteria:

Be an Active or Associate Member at the time of application

Possess an overall grade point average (GPA) of 3.5 or better (on a 4.0 scale)

Submit the AEA application and supporting documents to National Headquarters by January 1 or June 1.

Visit <http://www.kkpsi.org/programs/aea-scholarship/> for more information.

#### MATCHING GRANTS PROGRAM

<http://www.kkpsi.org/forms/KKYGrantForm.pdf>

In order to promulgate Kappa Kappa Psi's mission of promoting the advancement of college and university bands through dedicated service and support to bands, and recognizing the

significance of providing guest conductors and performing artists to work with our concert bands, the National Council of Kappa Kappa Psi has created a Matching Funds/Grant Program to

provide financial support for obtaining guest conductors and performing artists for college/university concert bands.

#### MONTH OF MUSICIANSHIP

The Mission and Purpose of Kappa Kappa Psi directly reflects our goal of celebrating music in college bands. While we should always focus on this goal, the Kappa Kappa Psi Month of Musicianship, each November, provides a special outlet for celebration. Use this specially dedicated month to reach out beyond your chapter, your band, or your university to bring this love of bands and music to others!

As a chapter, find a way to share our love of music with others. Go as a group to a concert or volunteer to help an ensemble you do not usually support. Usher a concert, organize a reading band, or set up a lab band for music majors to practice conducting. Provide money to bring a professional musician to your campus. Consider reaching out beyond your

university to support a local high school or community band.

Please be sure to document your activities in writing and in photographs. Share your ideas on Facebook or on Twitter so that others can benefit. Submit a Podium article! What you do could end up in the next issue of The Podium or published on Podium ONLINE.

### NATIONAL INTERCOLLEGIATE BAND

<http://www.kkysbs.org/nib/>

One of the most exciting contributions made to the work of collegiate music during the last half-century has been the National Intercollegiate Band program of Kappa Kappa Psi and Tau Beta Sigma. This ensemble continues to make a significant contribution to the advancement of the collegiate band. Open to all qualified musicians, whether or not they are members of the Fraternity or Sorority, the NIB brings members face-to-baton with some of the most dynamically stimulating composers and respected conductors in America. Visit the NIB website for audition and ensemble information.

### COMMISSIONING PROGRAM

<http://kkysbs.org/commission.html>

The commissioning program of Kappa Kappa Psi and Tau Beta Sigma has made a significant impact on band music in America. This joint program was conceived by Kappa Kappa Psi Grand President Hugh E. McMillen (Alpha Iota) 1951-1953, who felt the organizations should offer something constructive to college and university bands. Brother McMillen saw in the National Intercollegiate Band and its sponsoring fraternity and sorority the perfect vehicle for a lasting contribution to the field of concert band literature. He proposed a program to commission a special work for concert band by a noteworthy composer in Kappa Kappa Psi and Tau Beta Sigma's name.

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