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PILOTING A NEW PHIKEIA PROGRAM

WHAT TO EXPECT

SUMMARY:
Starting in the fall of 2019, Phi Delta Theta will be working with thirty-nine chapters to pilot a safer, efficient, and more effective Phikeia process as part of a holistic member development experience. This process is a values-based experience that supports chapters during the recruitment period, Phikeia process, as well as the transition and acclimation of Phikeias to active and contributing members. The process will incorporate volunteer advisers, e-learning through PDT U, facilitated conversations surrounding topics that impact college men, and an emphasis on building skills such as team work, initiative, accountability, responsibility, and leadership. The goal of the pilot program is to try out new ways to retain members, educate them accurately about Phi Delta Theta, and improve how chapter members and Phikeia bond.

WHY:
• Take part in shaping the future of Phi Delta Theta to provide a safer, efficient, and more effective program
• Have your voice heard to provide input for solutions on recruitment, brotherhood, philanthropy, and scholarship
• Connect with other chapters, GHQ staff, and volunteers to collaborate and receive extra support
• Combine the chapter's personality along with a Phi Delta Theta standardized program

EXPECTATIONS:
• Chapter participating must have the recruitment chairman and Phikeia educator training with Phi Delta Theta's growth and education teams
• Chapters participating will need at least one, but preferably more, volunteers as active supervisors during the recruitment and Phikeia process
• Chapter volunteers will be invited to a video conference call to be updated on their expectations
• Phikeia educators and recruitment chairman will be expected to participate in weekly or bi-weekly conference calls
• Chapters participating should be open-minded to a new process while providing candid and detailed feedback

Phikeia Onboarding Experience (Retreat with alumni/volunteer presence)
- MEMBER EXPECTATIONS
- TEAMWORK
- RESPONSIBILITY
- EXEMPLARY LEADERSHIP

New Member Program (Pilot three weeks)
- INITIATIVE
- MENTAL HEALTH AND WELLNESS
- ACCOUNTABILITY
- COMMUNITY ENGAGEMENT

Acclimation: Chapter operations committee assignment
- SURVEY ASSESSMENT
- COMMITTEE ASSIGNMENTS
- NEW MEMBER EXPECTATIONS

CONCLUSION:
This pilot program experience should last the entire semester and is the foundation level of our new four-year program that helps members personally grow and achieve their goals while staying active with the chapter. We want to learn from members like you about what the fraternity of tomorrow needs to focus on. In addition, we are exploring how your member development experience could be recognized by a third-party business or university for leadership development.
PHIKEIA ONBOARDING

OVERVIEW

OBJECTIVES:
Phikeias will be able to:
• Build on their connections with class members and brothers within the chapter after the recruitment process
• Recall basic expectations of the Phikeia process and members of the chapter
• Access their PDT U accounts
• Describe their personal strengths, weaknesses, and leadership style
• Create and explain their goals for their college career

HOUSEKEEPING:
• Phikeia educators will need to plan ahead to reserve any spaces on campus and communicate to the chapter, advisers, and speakers dates and times of all meetings for the Phikeia program
• Phikeia will create their MyPDT account
• Phikeia will sign the risk management and alcohol-free housing affidavit
• Phikeia should be assigned the Friendship PDTU module to complete by the first meeting
• Phikeia will be given an overview of the process that will include:
  • Overview of the program
  • Chapter history
  • Contact information
  • Instructions for MyPDT and PDT U Online education modules
  • Checklist of expectations for Phikeia and members
  • Risk management policies

EXPECTATIONS:
The Phikeia educator will:
• Complete the induction ceremony
• Host the Phikeia retreat
• Enter Phikeia into MyPDT
• Begin building a mentor relationship with Phikeia and seeking big brother applicants
• Provide contact information for who they can contact regarding health and safety, mental health, finances, or academics

EVENTS HAPPENING:
1. End of recruitment
   • Recruitment chairman
2. Chapter approval of Phikeia
   • Chapter meeting with adviser(s)
   • Depending on chapter bylaws
3. Bid distribution
   • Chapter leadership
   • Depending on university policy
4. Induction Ceremony
   • Phikeia educator, president, chaplain, treasurer, Phikeia, and chapter
   • Followed by programming
5. Retreat
   • Phikeia educator, potential big brothers, chapter leadership, adviser(s)
   • Timing and location to be planned ahead
PHIKEIA RETREAT

EXAMPLE

OBJECTIVES:
Phikeias will be able to:
• Build on their connections with class members and brothers within the chapter after the recruitment process
• Recall risk management policies and expectations of the Phikeia process and members of the chapter
• Access their PDT U accounts
• Describe leadership styles of their class and self
• Create and explain their goals for their college career

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

NEEDED:
• People:
  • President
  • Phikeia educator
  • Adviser(s)
  • Education committee
  • Treasurer
  • Chaplain
  • Phikeia
  • Potential big brothers
• Location:
  • The retreat should be somewhere on campus, in town, or within a manageable driving distance that is not the chapter house. The retreat should minimize daily interruptions and allow attendees to focus on bonding and learning about the membership expectations.
• Materials:
  • Laptops
  • Membership expectations list
  • Phikeia pins
  • Phikeia manuals
  • Printed Phikeia packets
  • Loose-leaf paper and post-it notes
  • Induction ceremony materials: script, candles, roll book, etc.
  • Projector and presentation (if desired)

INDUCTION (30 MINUTES):
• Follow the induction materials provided

INTRODUCTIONS (10 MINUTES):
• Chapter president
  • Welcome the new members and congratulate them on being selected by the chapter as men on campus who exemplify the cardinal principles of Friendship, Sound Learning, and Rectitude. Explain what your role is, and how you are important the chapter as well as the Phikeia program. Finally conclude by assuring them that you are a resource for them.
• Adviser
  • Welcome the new members and active members. Introduce yourself and how you volunteer your time to help the chapter. Explain how a fraternity is a lifelong commitment rather than four years. Extend your support by offering your contact information if they are in need of anything you can help with over the process or while they are in school.
PHIKEIA EDUCATOR
- Have the new members quickly introduce themselves to everyone in the room.
- Introduce yourself and your role as the Phikeia educator as well as your committee.
- Explain the purpose of the retreat, and a brief overview of the schedule.

PROGRAM OVERVIEW (15 MINUTES):
- Phikeia Educator and committee
  - Brief overview of the program
  - Week-by-week breakdown
  - Point out where they can find important contact information
  - Explain the use of MyPDT and PDT U
  - Review health and safety and risk management policies and how they pertain Phikeia, brothers, and the chapter. (e.g. Anti-hazing Policy, Alcohol-Free Housing, Good Samaritan Policy, Bystander Education, and event planning procedures)
    - Actions of brothers and Phikeias reflect on the chapter as a whole
    - "Joining Phi Delta Theta, you are now a representative of the chapter, the community, the alumni, the international organization, and future members. This comes with many responsibilities, but mostly, it comes with a responsibility to do what ought to be done. This comes from a quote from our Founder Robert Morrison: 'To do what ought to be done but would not have been done, unless I did it, I thought to be my duty.' Overall, as Phis we should look out for those around us and always act with dignity."
    - If initiated, new members will continue their education to further develop as brothers with the chapter, their big brothers, and as a class.

EXPECTATIONS (25 MINUTES):
- Phikeia Educator and committee
  - Tell the Phikeia why you joined the chapter, provide an example that goes beyond having friends in the chapter.
  - Ask the Phikeia to write down two items on a piece of paper:
    - Why are you joining Phi Delta Theta?
    - What do you hope to get out of joining Phi Delta Theta?
    - It is important to stress to go deeper than "I liked the brothers."
    - Give them time to write something down and ask for a few to share.
    - Collect the papers to be used at the end of the Phikeia process.
  - Explain that joining the chapter is a give and take. The more they put into their experience, the more they will get out of it. For this reason, every Phikeia will shadow an officer or be a part of a committee before they are initiated to see what part of the chapter they can have a role in shaping for the future.

MYPDT AND PDT U (15 MINUTES):
- Phikeia Educator and committee
  - Register all Phikeia on MyPDT, they will get a confirmation email and will need to create an account before the first meeting
  - Show the Phikeia how to login to MyPDT and access PDT U. Assign them the first module to complete before the first meeting of the program

VIDEO (5 MINUTES):
- To wrap up, we are going to watch a quick video: https://www.youtube.com/watch?v=eOZfGZ0rENA
  - "Meeting your true potential by celebrating yourself and each other." Looking at your college career, or further, what does your greatest potential look like?
  - Allow for responses, and end by sharing how you have personally benefited from joining the chapter or taking a leadership position.

DEBRIEF (10–20 MINUTES):
- A lot of information was given to the Phikeia today, so take the time to ask them what they learned and if they have any questions.
- Explain that each week of the program is meant to showcase one of the Cardinal Principles. Each step further into the program will allow the Phikeia to learn more about the chapter and themselves. Clearly state that you get out what you put into the Fraternity. This is an ever-growing chapter, and within the next four years the Phikeia will become the leaders.
EVENT (60–90 MINUTES):
• Escape Room Challenge
• Debrief questions:
  • What did you learn about each other in the escape room?
  • What made the team successful / What hindered your success?
  • What would you do differently if you could do it again?
  • What role did you play in the group?
  • Who stood out as a leader? Why? What traits did they have?
  • Explain the different leadership styles of:
    • Modeling the way
    • Inspiring a shared vision
    • Challenging the process
    • Enabling others to act
    • Encouraging the heart

REMINDERS (5 MINUTES OR POSTED IN AN EMAIL OR ONLINE NOTIFICATION):
• Remind them of anything that needs done for the next meeting/activity as well as the schedule
  • Friendship module on PDT U
  • Look over Phikeia Manual
  • Review the Phikeia Oath (page 6)
  • Pay dues on _________________ or set up payment plan with treasurer
PHIKEIA EDUCATOR

REMINDER

RETREAT OUTLINE AND PURPOSE AT YOUR CHAPTER

• Outline
  • Every retreat may look differently. Whether it is a weekend retreat or a 90-minute meeting, your retreat will be specific to your chapter. Use the template above to begin your planning stages to build your retreat that will best fit the schedule and resources of your chapter.
  • The retreat should always include onboarding and preparation for the Phikeia program; however, the induction ceremony can be done at another time. If done at another time, it should follow the standardized induction programming provided by Phi Delta Theta.

• Purpose
  • As every chapter will have a different retreat, all chapters should have the same purpose behind the retreat
  • Reread the objectives and purpose from the beginning of this section

• Objectives:
  • Phikeias will be able to:
    • Build on their connections with class members and brothers within the chapter after the recruitment process
    • Recall risk management policies and expectations of the Phikeia process and members of the chapter
    • Access their PDT U accounts
    • Describe leadership styles of their class and self
    • Create and explain their goals for their college career

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

OVERVIEW: FRIENDSHIP

OBJECTIVES FOR PHIKEIAS:
Phikeias will be able to:
• Analyze and explain the similarities and differences between brotherhood and friendship
• Breakdown the red flags of someone struggling with their mental health and ways to intervene
• Bond with their class and members of the chapter
• Identify and meet with an officer in the chapter they find interesting

HOUSEKEEPING:
• Phikeia educators will need to plan ahead to reserve any spaces on campus and communicate to the chapter, advisers, and speakers dates and times of all meetings for the Phikeia program
• Follow up with Phikeia before meeting to complete Friendship PDT U module
• Remind Phikeia of their financial obligations
• Plan for the community engagement project for week two
• Continue to seek out potential big brothers in the chapter for week three
• Be sure all Event Planning Forms are completed through OmegaFi’s MyPDT

EXPECTATIONS FOR EDUCATOR:
The Phikeia educator will:
• Host weekly meeting
• Invite a guest speaker about mental health, brotherhood, or masculinity
• Assist in the planning of the Phikeia/brotherhood event
• Prepare to discuss the Friendship module
• Assign Sound Learning PDT U module for week two
• Discussion topics:
  • The Phikeia Oath
  • Friendship vs. Brotherhood
  • Definition of Friendship, why it is a cardinal principle

EVENTS HAPPENING:
1. Meeting: Friendship
   • Phikeia Educator, Phikeia
2. Phikeia/brotherhood event
   • Phikeia educator, Phikeia, potential big brothers
3. Officer meeting
   • Phikeia, chapter leadership
     • Phikeia should meet with or shadow one officer or committee in the chapter during the three weeks
OVERVIEW: SOUND LEARNING

OBJECTIVES:
Phikeias will be able to:
• Prepare and set SMART goals for their college career
• Review scholarship and academic programming and expectations
• Relate sound learning to their personal goals in college and life
• Summarize why it is important to serve the surrounding community or perform philanthropy

HOUSEKEEPING:
Phikeia educators will need to plan ahead to reserve any spaces on campus and communicate to the chapter, advisers, and speakers dates and times of all meetings for the Phikeia program.
• Follow up with Phikeia before meeting to complete Sound Learning PDT U module
• Remind Phikeia of their financial obligations
• Solidify service project details and location
• Continue to seek out potential big brothers in the chapter for week three
• Prepare for guest speaker or alumni event in week three

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

EVENTS HAPPENING:
1. Meeting: Sound Learning
   • Phikeia educator, Phikeia
2. Service event
   • Phikeia educator, Phikeia, potential big brothers
3. Officer meeting
   • Phikeia, chapter leadership
     • Phikeia should meet with or shadow one officer or committee in the chapter during the three weeks
OVERVIEW: RECTITUDE

OBJECTIVES:
Phikeias will be able to:
• Clearly define what rectitude means formally and personally
• Explain how they can make a positive impact in the community, on campus, and within the chapter
• Indicate how older members and alumni have used the three cardinal principles within their lives
• Explain how expectations and accountability play a part in Phi Delta Theta

HOUSEKEEPING:
Phikeia educators will need to plan ahead to reserve any spaces on campus and communicate to the chapter, advisers, and speakers dates and times of all meetings for the Phikeia program
• Follow up with Phikeia before meeting to complete Rectitude PDT U module
• Remind Phikeia of their financial obligations
• Plan for the final alumni/guest event for this week, chapter vote, and initiation
• Review the big brother ceremony and activities to do before and after

EXPECTATIONS:
The Phikeia educator will:
• Host weekly meeting
• Assist in the planning of the alumni or guest speaker
• Prepare to discuss the Rectitude module
• Host a big brother ceremony and event
• Obtain a chapter vote for initiation
• Assign committee positions to new members, with assistance from chapter officers
• Discussion topics:
  • The Phikeia Oath
  • Morrison's Philosophy
  • Definition of Rectitude, why it is a Cardinal Principle

EVENTS HAPPENING:
1. Meeting: Rectitude
   • Phikeia educator, Phikeia
2. Alumni/guest speaker
   • Phikeia educator, Phikeia, potential big brothers, guest speaker, alumni
3. Big brother ceremony/event
   • Phikeia educator, Phikeia, big brothers, adviser
4. Chapter vote
   • Phikeia educator, chapter, adviser
5. Initiation/event
   • Chapter, adviser
NEW MEMBER ACCLIMATION

OVERVIEW

OBJECTIVES:
Newly initiated members will be able to:
• Acclimate as an initiated member of the chapter to chapter operations
• Understand and explain ritual and its importance
• Define membership expectations
• Select an area of the chapter to enhance through serving on a committee or running for election

HOUSEKEEPING:
• An initiation report needs to be completed through MyPDT
• Confirm that The Bond, financial roster, university roster and MyPDT Roster are consistent
• All dues should be collected or accounted for through the treasurer

EXPECTATIONS:
The Phikeia educator will:
• Work with the Big Brothers and Warden to successfully teach ritual and the meaning of ritual to each newly initiated brother
• Confirm completion of the initiation report through MyPDT
• Confirm that all Phikeias have been placed on a committee within the chapter
• Continue the mentoring relationship with new members to make sure each member is held accountable to the expectations of membership and given the rights and privileges of membership
• Develop opportunities of continued education for all members of the chapter but specifically the newly initiated members of the chapter
• Have each member of the newly initiated class complete the post-initiation survey provided by GHQ
• Schedule a call with the GHQ liaison to discuss the completion of the program

WEEKLY EDUCATIONAL OPPORTUNITIES:
Once the Phikeias have been initiated and all expectations have been met, it is important to schedule continued education programs for the new member class to further bond them with the chapter and each other. Through these programs, they will continue to learn about important resources and topics to help transition them to college and fraternity life. Below are recommended topics and campus resources to facilitate and provide this important education.
• Financial literacy and student loans
  • Financial aid office
• Internships and résumé building
  • Career services office
• Student organization involvement opportunities
  • Campus activities and student activities office
• Study skills and academic resources
  • Student academic resource office
• Men and mental health and wellness
  • Counseling and psychological service office/health center
• Recreation and personal wellness
  • Recreation and wellness center
• Community service opportunities
  • Community engagement and civic engagement office
• Student rights and responsibility
• Student conduct and dean of students
• Major exploration and academic advising
  • Academic advising office and provost office
• Study abroad opportunities
  • Global engagement and study abroad office
• Athletic support
  • Athletic department
• Campus safety
  • Campus police and public safety office
• Fraternity and sorority community relations
  • Fraternity and sorority life office

**BIG AND LITTLE BROTHER FIRESIDE CHATS:**
The Big and Little Brother program’s main purpose is to ensure that the newly initiated members are transitioning into the chapter, being held accountable, and have someone to turn to in the chapter. Fireside chats are meant to be a time for one-on-one conversations or a group of big brothers and little brothers to come together to talk about topics. The following discussions can be had by asking some of the provided questions.

**Social Media**
• What role does social media have on mental health?
• What role does social media play in the social life of college?
• What role did social media play in high school?
• What do your social media accounts say about you?
• What do you want them to say?
• What do your social media accounts say about your friends and organizations you are involved in?
• What “group chats” are you a part of?
• Would you let anyone read those group chats?
• How can you prevent negative outcomes from social media and group chats?
• How can we build a positive online presence?

**Ritual**
• What is ritual?
• Why is ritual important?
• What does ritual really teach us?
• What does our open motto, “one man is no man” and “we enjoy life by the help and society of others” mean to you?
• Explain an example of how you have exemplified that in the past or how you can in the future?
• What does our secret motto, “explain” mean to you?
• What are the obligations of Phi Delta Theta members?
• How can you uphold those obligations?
• If we live the values and uphold the ritual of Phi Delta Theta, what would that look like on a daily basis? Yearly? When we graduate? After we graduate?

**Academics**
• How are classes going?
• What do you want to do after you graduate?
• Are you planning on getting an internship? Have you started the process?
• What is your toughest class? Why?
• What class are you most excited to go to?
• Have you been to any of your professors’ office hours?
• Are you ready for mid-terms/finals?
• Is there anything I can do to help you study?
• How do you study? Is it working for you?
• Have you met with your academic adviser? What did you talk about?
• How have you balanced your time while in school?
• Do you want to go to the library and study together?

**Bystander Intervention**
• Have you taken the PDT U Be Your Brothers’ Keeper Module yet?
• What did you learn?
• Why do you think the bystander effect still exists?
• Have you ever been in a situation that you needed to take action? What did you do?
• How do you think our brothers would act in a situation that needed action?
• What should we do?