

KAPPA KAPPA PSI
NATIONAL HONORARY BAND FRATERNITY



Expansion Program & Petitioning Group Handbook



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OVERVIEW

Kappa Kappa Psi is the leading all-gender fraternity dedicated to promoting and advancing college and university bands through Musicianship, Leadership, Service, and Brotherhood. Our expansion philosophy is to establish a lasting partnership with college/university band programs and campuses across the country to build successful chapters and a positive student experience.

The petitioning period is a probationary time of 4 to 12 weeks during which dedicated band students work together to obtain active chapter status while beginning their service, leadership, and support for their band program. The petitioning period serves the purpose of allowing petitioning members to operate as a chapter, enabling the National Organization to assess the ability of the new group to sustain a continuing effort to support its band program and to maintain contact with the National Organization.

Similar to the Petitioning Group process, the Fraternity now offers a “ReCharge” process to chapters that have declined dramatically in membership numbers at institutions where we have already established a lasting partnership.

The Petitioning Process Checklist is provided to help guide you through the petitioning process from start to finish. Utilize this checklist in addition to the other resources given to you by Kappa Kappa Psi. Petitioning Group tasks have been designed to help the petitioning group concentrate on maintaining and updating existing standards, policies, and programming. The petitioning group will begin establishing an identity based on the core values of the organization: musicianship, leadership, and service. In addition, the petitioning group will complete petitioning documents and complete a formal petitioning document to be submitted to the Kappa Kappa Psi National Headquarters. The goal for the process is that the performance components during the next few months will help the petitioning group reach normal chapter operating levels by installation.

Should you ever have any questions, please contact your Advising Team, the National Membership & Expansion Coordinator, or the National Vice President for Membership & Expansion.

IMPORTANT CONTACTS

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PETITIONING GROUP VS RECHARGE GROUP

This document details two different but similar processes. The Petitioning Group process is focused on establishing a Chapter - either a brand new Chapter or a Recharter of an inactive Chapter. Meanwhile, the ReCharge process is focused on re-establishing a current active Chapter that has fallen dramatically in membership numbers or current Fraternity practices. In both cases, a group of trained Alumni volunteers will serve as an advising team to educate the Chapter and work with them. This will occur across three phases that are focused on membership education and Chapter operations. In both cases, a similar timeline is used and often similar documents are required. At the end of the day, both processes are aimed at establishing functioning Chapters.

Thus, the differences between these two processes are minimal and the terms can be used interchangeably. In general, the Petitioning Group process has more requirements than the ReCharge process. These requirements include:

- Charter Fee of \$300
- Petitioning Group Documents
- Installation Ceremony

Additionally, the Petitioning Group process starts via an application (<https://www.kkpsi.org/expansion/>) and vote of the National Council to accept the Petitioning Group application.

Aside from the differences, both processes are split up in three phases. In the first phase, groups are instructed on the Fraternity's membership education program and Chapter Operation best practices. Meanwhile, the second two phases are focused on continued Chapter support for at least a year. Overall, we hope that both processes can be used to establish strong and healthy Chapters that support their band programs for many years to come.

PETITIONING GROUP INITIAL STEPS

Prior to submitting an application for consideration as a petitioning group, we recommend forming an Interest group to prepare the application. In general, we recommend the following steps to prepare a interest group:

- ❑ Create an Interest Group of at least ten (10) band members interested in pursuing expansion and membership in Kappa Kappa Psi. This group should be diverse and reflective of the band program.
- ❑ Seek approval from the Director of Bands and band faculty/staff
- ❑ Identify campus qualifications for chartering a chapter and registering as a student organization (Dean of Students, Student Activities, Student Organizations)
- ❑ Hold an Interest Group meeting and elect officers
 - **President** – presides over all meetings, signs all documents, responsible for correspondence with National Headquarters.
 - **Vice President for Membership** – presides over all meetings in the absence of President, works closely with National Headquarters to create Membership Education Program for the chapter
 - **Secretary** – takes minutes at all meetings, tracks member attendance
 - **Treasurer** – responsible for collecting all dues and fees, take the lead on creating a bank account, create fundraisers for the petitioning group

PETITIONING GROUP APPLICATION PROCESS

Upon formation of an interest group, it will be necessary to start a Petitioning Group application. All information on the **Application and Fees** can be found at www.kkpsi.org/membership/starting-a-chapter, where the most recent application can be downloaded. In addition to the application, we have provided the following checklist to assist with application preparation:

Checklist:

- Required Petitioning Group Application Fee (check or money order only): \$150
 - This fee is nonrefundable, regardless of whether the application is approved or denied
- Required Signatures (application and policy acknowledgement):
 - Petitioning Group President
 - Director of Bands
 - Petitioning Group Sponsor
 - Dean of Students (or representative)
- Evidence of Institution Accreditation
- Letter of Support from Dean of Students (or campus equivalent)
- Letter of Support from Director of Bands
- Optional Letter(s) of Support from Associate/Assistant Band Directors
- Listing of Petitioning Members that reflects a diverse population of band members
- Listing of Honorary Members

Please type in all information and print or save. A completed packet includes all of the information listed on the cover page. The application and fees can be submitted in one of two ways.

- Option 1:** Save the application, scan letters of support and email all documents to brooks@kkytbs.org. Send fees (check or money order) certified mail or submit through the online payment gateway at <https://www.kkpsi.org/form-payment-gateway/>.
- Option 2:** Print all documents and mail along with fees (check or money order) certified mail to the Fraternity's National Headquarters at the address provided on the application.

Upon receipt of the Petitioning Group Application Packet and application fees, the National Council will review the application for selection as a new petitioning group. The National Headquarters will notify the new petitioning group via an email letter when the National Council has made its decision. For approved petitioning groups, the National Headquarters will issue each member a Prospective Member pin. The National Vice President for Membership & Expansion and National Membership & Expansion Coordinator will send information regarding the petitioning process.

If a Petitioning Group is not approved by the National Council, their initial fee is not refunded. However, denial of a Petitioning Group does not prevent future applications.

THE RECHARGE PROCESS

In order to help chapters re-invigorate their membership numbers, the National Council has piloted “The ReCharge Process” starting in 2022 with a select number of Chapters to great success. In this process the National Council will work with the Director of Bands and Sponsor(s) to ReCharge the Chapter ensuring that the Chapter is able to continue both its operations and support of their respective band programs.

- ❑ Have the Director of Bands and/or Sponsor inform the National Council of their desire to have their Chapter undergo the ReCharge Process.
- ❑ If approved by the National Council, the National Council will, in collaboration with the Director of Bands and Sponsor, work to identify Advisors to form an ‘Advising team’ to assist with the Chapter.
 - This group can be made up of local Fraternity Alumni, successful Chapter Alumni, Fraternity Leadership members, non-Fraternity members, and more. This group has ideally 2 to 5 members who can help the Chapter design a plan for success and will work with the Chapter for the biennium.
- ❑ Once an advising team is determined, they will work alongside the Director of Bands and/or Sponsor to identify members who can advance the Chapter.
 - Having the Director of Bands encourage the identified students to join the Chapter is of benefit to the Recharge Process.
 - When possible, current Actives are encouraged to stay on throughout this process.
- ❑ The National Vice President for Membership and Expansion, alongside the advising team, will develop a ‘ReCharge process calendar.’
- ❑ The advising will work with the Chapter to take them through the process detailed here. The Chapter will continue to operate throughout and after the Recharge process. The group of advisors will be available for the Chapter as a resource for at least one year.
 - If desired by the Director of Bands, and allowed by University policy, one of the Advisors may be appointed as a Chapter Sponsor for continued mentorship of the Chapter.

FRIEND AND ADVOCATE PROGRAM

The Friend and Advocate Initiative was launched in the Spring of 2024 by Vice President of Membership and Expansion Dr. Nicholas Rorrer to train alumni on the current practices of the Fraternity as well as train advising teams for both Petitioning and ReCharge processes. This initiative trains alumni in:

- The current policies of the Fraternity
- The current state of the Fraternity
- The current trends we are seeing with Chapters
- How to teach “The Road to Wisdom”
- How to teach “The Inner Circle”
- Strategic Planning for Chapter Operations

PETITIONING & RECHARGE PROCESS

OVERVIEW - PHASE 1

Lesson 1: Orientation Meeting and Risk Management Policy Review - See next section. Includes Lesson 0 and Lesson 1 of the Road to Wisdom.

- **DUE:** Petitioning/ReCharge Group Calendar - A tentative timeline for when lessons and degrees will occur alongside when paperwork will be submitted.

Lesson 2: Our Service - An overview of Service as a critical component of Kappa Kappa Psi reviewing the "Our Service" and Fraternity's Founding history while discussing how to design a Chapter. Includes Lesson 2 of the Road to Wisdom.

Lesson 3: Our Leadership - An introduction to Fraternity's Leadership, the value of developing leaders, and the basics of running a Chapter meeting. Includes Lesson 3 and 4 of the Road to Wisdom.

Recommended: First and Second Degree of the Ritual of Kappa Kappa

Psi. If Second Degree cannot be accomplished in person, we recommend doing a virtual First Degree and delaying Second Degree to be with Third Degree. However, it is our strong recommendation to perform Second Degree halfway through the process.

Lesson 4: Our Musicianship - This lesson introduces musicianship as another of our core values as well as the National Intercollegiate Band. During this meeting, the basics of budgeting and fundraising will also be reviewed. Includes Lesson 5 and 7 of the Road to Wisdom.

- **DUE:** Chapter Constitution - The Chapter Constitution should set forth the officer structure and a couple other basics of Chapter operations. This document can evolve over time as the Chapter grows and changes.
- **DUE:** Chapter Initiation Dues & Fees
 - Petitioning Members - \$150.00 each
 - Honorary Members - \$150.00 each (this includes DOB/Chapter Sponsor if they are being initiated as honorary members)
 - Charter Fee - \$300.00 (Petitioning Groups only)

Lesson 5 : Our Brotherhood - This final lesson is focused on recruitment, retention, and those bonds that bind us together as a Brotherhood. Includes Lesson 6 of the Road to Wisdom.

All dues and fees must be paid before proceeding further.

At this time we also recommend a pre-initiation call (Page 15) with the National Vice President of Membership and Expansion,

Third Degree of the Ritual of Kappa Kappa Psi. The Second Degree of the Ritual can also occur before the third degree if it was not performed previously.

Chapter Installation (*Petitioning Groups Only*)

- **DUE:** Petitioning Document - This document details the members of the Chapter, the petitioning group and Chapter's history, school's history, and Band's history.

Lesson 6. Our Journey - In this final lesson of Phase I, petitioning groups will complete their process and reflect upon it. This will include the Portfolio Presentation from the Road to Wisdom and all required documents. *Includes Lesson 8 of the Road to Wisdom.*

- **DUE:** Portfolio Presentation
- **DUE:** Recruitment and Retention Philosophy - This document details how the Chapter will recruit, select, and retain members. Also should include any university requirements for membership.

PETITIONING AND RECHARGE GROUP ORIENTATION MEETING

The Petitioning and ReCharge Group Orientation Meeting is the official start of the membership process and is critical for setting up expectations for the process itself. This meeting will be led by either an HQ staff member or a trained volunteer of the Fraternity. As this is the first meeting, it is critical to have this meeting be a success to both engage members and set clear expectations for their involvement in this process and with Kappa Kappa Psi. At minimum, this meeting should cover:

- **Fraternity Risk Management Policies**
 - www.kkpsi.org/resources/policies
- Overview of the Petitioning Process
- Establish a timeline for completing documents and turning in payment of fees. Please note that documents will require some revisions and edits before final approval. We suggest the chapter form small committees to work on all documents concurrently.
Required petitioning documents:
 - Petitioning Group Calendar
 - Chapter Constitution
 - Membership Recruitment Philosophy & Membership Selection Guidelines
 - Petitioning Document
 - Initiation Fees & Chapter Installation Form in OPUS
 - Create Petitioning Group Officer and Committee Responsibilities
- Identify key areas of musicianship, leadership, and service
- Setting expectations for Alumni Involvement
- Role of the Director of Bands and Chapter Sponsor

Other resources that may be covered include:

- Introduction to The Road to Wisdom Membership Educational Program
 - www.kkpsi.org/curriculum
- Introduction/Explanation of Vision and Mission Statements; Fraternity Purposes; Creed; Fraternity brand and symbols
- Chapter Officer Training Resources: www.kkpsi.org/officer-resources
- Create fundraisers, budget, establish a bank account, record meeting minutes, create chapter email listserv, social media, committee structure, meeting agenda

PHASE I REQUIRED DOCUMENTS

Phase I of the Petitioning and ReCharge group process can be intensive as it is focused on laying the foundation for a successful Chapter. This includes everything from Chapter Operations to Membership Education.

- Portfolio Presentations are required for all members of the Petitioning or ReCharge Group process. This is part of the *Road to Wisdom* and has members creating reflections on their membership process. Please refer there for more details.
- Petitioning Group Calendar submitted to National Vice President for Membership & Expansion and National Membership & Expansion Coordinator for approval
- Petitioning Group Constitution submitted via email to National Vice President for Membership & Expansion, and National Membership & Expansion Coordinator. Please note that documents will require some revisions and edits before final approval.
- Recruitment and Retention Philosophy - submitted via email to National Vice President for Membership & Expansion, and National Membership & Expansion Coordinator. Please note that documents will require some revisions and edits before final approval. **This will be refined in Phase II and Phase III.**
- Petitioning Document submitted via email to the National Vice President for Membership & Expansion, and National Membership & Expansion Coordinator. This document should be digitally submitted to HQ as a PDF with a signed petitioning page. Any printing should be done on acid-free cotton-bond paper for preservation. Please note that documents will require some revisions and edits before final approval.
- Membership Fees can be submitted online at <https://www.kkpsi.org/form-payment-gateway/> As a reminder dues for the 2023-2025 biennium are:
 - Petitioning or ReCharge Members - \$150.00 each
 - Honorary Members - \$150.00 each (this includes DOB/Chapter Sponsor if they are being initiated as honorary members)
 - Charter Fee - \$300.00 (Petitioning Groups Only)
- Chapter Installation Form submitted in OPUS (*Petitioning Groups Only*)

PRE-INITIATION CALL

Prior to initiation of new Brothers, we suggest a virtual pre-initiation call with a representative of the National Organization (VPME, Membership and Expansion Coordinator, etc) to meet with college/university officials, the Sponsor, and Petitioning/ReCharge officers. This visit is designed to ensure that requirements have been met, hear feedback on the process, and ensure the band program and campus is prepared to sustain and support an active chapter.

The structure of the visit is as follows:

- Review completed National Requirements:
 - Installation Form
 - Collection and Payment of Dues
 - Constitution
 - Petitioning Document
- Discussion of the Band Program as it is today
- Discussion of Chapter Band Support in terms of Musicianship, Leadership, Brotherhood, and Service
- Review of Future Paperwork and National Deadlines**
- Review of Responsibilities of an Active member: Attendance, Dues, Participation in Band
- Discussion on Active and Passive Recruiting
- Discussion on Areas of Strength and Improvement**

INSTALLATION CEREMONY

When the National Council approval has been granted, official plans for the installation of the chapter may be finalized. This event is closely coordinated between National, District, and Local officers. A representative of the National Organization will travel to your chapter to perform the Chapter Installation Ceremony. This ceremony is to follow Ritual and Initiation which will be performed by a chapter or team appointed by the National Vice President for Membership & Expansion.

While the fraternity's Ritual and Initiation are private events for petitioning members, honorary members, and Brothers, the Installation Ceremony is a public event often attended by fellow band members, family, and friends. It is common for new chapters and visitors to hold a fellowship event (e.g. a reception, a meal at a local restaurant, etc.). This is a moment of pride for the petitioning members who have completed their initial journey as Brothers in building and sustaining an active chapter of Kappa Kappa Psi.

PHASE I RECOMMENDED ACTIVITIES

Although the timeline provides an overview of the process (Page 11) and the Required Documents (Page 14) provides a reminder on the requirements of the process, this checklist provides some recommended activities that will enable the success of a Petitioning Group and its Offices.

For Petitioning and ReCharge Group Officers we recommend...

- Establishing regular officer meetings
 - Creating officer notebooks and materials; utilize mass storage sites such as Google Drive if possible
 - Create goals to meet the calendar timeline established during the Petitioning Group Orientation Meeting
- Establishing petitioning group ad hoc committees to help complete documents
- Establishing regular communication with the Director of Bands and Petitioning Group Sponsor
- Maintaining communication with Advising Team, National Vice President for Membership & Expansion, and National Membership & Expansion Coordinator
- Getting an early start on the creation of a bank account** (contact student activities to ensure compliance with university procedures).
 - Additionally, the Petitioning or ReCharge Group Treasurer should set up dues expectations early and collect fees from members on an agreed upon timeline. This is extremely important and *should be taken care of as soon as possible*.

For the whole Petitioning and ReCharge Group, we recommend...

- Creating communication tools (Discord/Slack, listserv, social media, etc.)
- Establishing meetings outside the educational meetings to discuss Chapter aspirations and complete requirements. These meetings should:
 - Use Robert's Rules of Order to run the meetings
 - Have a meeting agenda and record minutes
- Create a Petitioning Group budget for both the current and upcoming semesters
- Elect the additional required officers:
 - Historian who will create chapters' social media pages and website, takes pictures of all events, takes the lead on creating the petitioning group's Petitioning Document
 - Alumni Relations Officer who will be responsible for establishing a line of communication with any alumni members
- Consider electing a Parliamentarian who will learn Robert's Rules of Order and take the lead on creating the petitioning group's Chapter Constitution
- Investigating possible fundraising opportunities
- Discussing and identifying possible service opportunities with the band directors.

PHASE II AND PHASE III OF THE PETITIONING AND RECHARGE GROUP PROCESS

Following installation, your Advising Team will continue to work with your chapter, at minimum, for one full year, to ensure the chapter's success. Broadly, the Advising Team provide support on the following subjects:

- Assistance on understanding and submitting National Reports in OPUS.
- Further refinement of the Recruitment & Retention Philosophy and Plan for new members
- Implementation of *The Road to Wisdom National Membership Education Program*
- Assistance with Chapter Rituals, Fundraising, or Service Projects
- Implementation of *The Inner Circle Ritual Education Program*
- Other topics, as needed by the chapter

To do so, we have introduced two phases to the Petitioning and ReCharge group process. In the second phase, the advising team will provide three specific lessons on designing the Chapter, designing fundraisers and service projects, and recruiting. Meanwhile, the Phase III of the process will focus more on passive support of the Chapter to ensure they are successful for years to come.

GUIDE TO FRATERNITY TERMINOLOGY

ADVISING TEAM – Group of individuals assigned by the National Vice President for Membership & Expansion to educate and work with the petitioning group to complete their requirements prior to chapter approval.

CONSTITUTION – The petitioning group will create a Constitution. This document is a set of bylaws that governs the future chapter's policies and procedures including membership, elections, attendance, and discipline. The National Headquarters will provide a template for the petitioning group to use.

DISTRICT CONVENTION – Each petitioning group is required to have at least one (1) member attend the District Convention. This will give the petitioning group an opportunity to better understand the scope of the organization. The petitioning group will have voting rights at certain times during the petitioning period. District Conventions are held during the spring semester, usually in March or April.

DISTRICTS – The chapters of Kappa Kappa Psi are geographically located in one of seven districts. Depending on where your school is located, your petitioning group will be in the Northeast, Southeast, North Central, Midwest, Southwest, West, or International District.

ELECTION OF OFFICERS – As soon as possible, petitioning group officers must be elected to serve as the executive team and guiding force in obtaining active chapter status.

HONORARY MEMBER – Honorary membership is the highest honor that can be conferred by a Chapter. Honorary members of the Fraternity shall possess the same qualifications as active or associate 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 have performed outstanding service for the college or university band or Fraternity. Undergraduates are ineligible for this recognition. When completing the petitioning group application, petitioning groups typically include their Director of Bands and Petitioning Group Sponsor as honorary members.

INSTALLATION – When National Council approval has been granted, official plans for the installation of the chapter may be made. This event is closely coordinated between National, district, and local officers.

KNOWING WHAT TO DO – The National Council and National Headquarters staff are prepared to serve as a constant source of information and support. However, the best possible assistance to the petitioning group will come from contact with active chapters. Active chapters may assist petitioning groups by sharing ideas for projects and activities, as well as by assisting with chapter operation.

NATIONAL COUNCIL – The National Council is the governing body of the National Chapter of Kappa Kappa Psi. The council votes on all matters pertaining to expansion on the advice and recommendation of the National Vice President for Membership & Expansion, who oversees the petitioning process.

NATIONAL HEADQUARTERS – The National Headquarters is the full-time administrative office of the Fraternity. Located in Stillwater, Oklahoma, the National Headquarters receives all forms, and monies; and, retains all the official records and archives of the organization. If you, your Director of Bands, or Sponsor has questions, they are invited to call 405-372-2333 and speak with the National Executive Director.

OFFICIAL RECOGNITION – When the preliminary forms and filing fee have been received and reviewed in the National Headquarters, official notification of the petitioning status is sent to Fraternity and District Officers.

OPERATION – The petitioning group is provided operational materials and receives all mailings from the National Headquarters. The petitioning group is expected to function as a chapter in developing a program of service and leadership to the band department.

PETITIONING DOCUMENT – The petitioning document serves as the official request for active chapter status, as well as providing a written and pictorial record of the band program, the sheltering institution, and the petitioning group. Guidelines and a template for preparing the petitioning document are provided to the petitioning group.

PETITIONING GROUP CALENDAR – Your petitioning group will create a petitioning group calendar with your Advising Team. This schedule should be followed as closely as possible.

PETITIONING GROUP SPONSOR – The Petitioning Group Sponsor serves as the advisor to the petitioning group and serves on behalf of the Director of Bands. This position is appointed by the Director of Bands and serves at his/her pleasure. The Petitioning Group Sponsor may also be the Director of Bands.

PRE-INSTALLATION VISITATION – Prior to the installation of a chapter, a representative of the National Organization will visit the campus to meet with college/university officials, sponsor, and petitioning members.

RECRUITMENT PHILOSOPHY & MEMBERSHIP SELECTION PLAN – This is a document that outlines how the future chapter will recruit and select future members. The National Headquarters will provide a template for the petitioning group to use.