



## LEADERSHIP CONSULTANT CHAPTER VISIT GUIDE 2020

### OVERVIEW

Pi Kappa Phi's Leadership Consultant program exists to provide hands-on servicing to our chapters, allowing our members to take advantage of experts in the field of chapter operations. Your Leadership Consultant will work with you to identify areas of improvement within your chapter and determine ways to overcome those challenges. During the visit, he will observe and assess what your chapter is doing well to pass your success on to other chapters of Pi Kappa Phi and recommend your chapter for national Pi Kappa Phi awards.

### BEFORE THE VISIT

#### 1. Prepare the following accommodations:

- **Parking Pass (if needed)** // If you tell your Leadership Consultant that he will be fine without one and he gets a ticket, the chapter will be responsible for the cost of the ticket or tow.
- **Internet Access** // Wireless or wired; if your campus requires user access, please make necessary arrangements with the campus' IT department (your fraternity/sorority life advisor should be able to help with this).
- **Workspace** // Including a desk for your Leadership Consultant to spread out and work.
- **Clean Living Accommodations**
  - **Clean Bed** // Couches in the living room are unacceptable; if he is staying in the house and the house has restricted access, make sure he has a way of entering/exiting the house that is not dependent on an individual member.
  - **Clean Shower** // If you/the average person wouldn't use it, the Leadership Consultant won't use it.
- **At Least One Guest Meal per Visit Day** // Please make necessary arrangements to have members bring your Leadership Consultant to the dining hall, chapter meals at the house (if applicable), or out to eat to an affordable restaurant.

Your Leadership Consultant reserves the right to bill the chapter for a hotel if proper accommodations are not made. **If you have questions about appropriate accommodations, please call your Leadership Consultant PRIOR to his arrival.**

#### 2. Prepare the visit schedule:

- **Inform the chapter** of the Leadership Consultant's upcoming visit.
- **Schedule one-hour meetings between the following officers and key committee chairmen and the Leadership Consultant:**
  - Archon
  - Vice Archon
  - Treasurer
  - Warden and Chaplain (combined)
  - Philanthropy Chairman

- Risk Manager
  - *Please note: the Leadership Consultant no longer requires meeting with all officers as in the past; the visits will be focused on the officers listed above to streamline visits and focus on 2-3 key strategic areas to move the chapter forward.*
  - **Schedule meetings between all other officers and committee chairmen** (e.g. Scholarship Chairman, Recruitment Chairman, etc.) **and the Leadership Consultant as needed to work on strategic areas identified as part of the pre-visit preparation.**
    - Generally, meetings should not be scheduled prior to 9:00 a.m. or after 9:00 p.m. If later meetings are necessary, be sure to contact your Leadership Consultant prior to his visit.
  - **Schedule a chapter meeting** during the visit, so your Leadership Consultant can provide an update on the National Fraternity and conduct educational programming with your chapter.
 

You will be able to select from a menu of possible workshops for your Leadership Consultant to facilitate with the chapter. **Chapters are expected to [select one of the workshops from the menu](#) and have at least 70% of the target audience in attendance for the workshop.**

    - A best practice for coordinating this meeting is to use your regularly scheduled chapter meeting for the Leadership Consultant to do the update and conduct the educational workshop; a “paper chapter” can be used to deliver any business items and executive board and committee reports.
    - If your Leadership Consultant is scheduled to visit the latter part of the week (“Beta Visit”), a best practice would be to cancel the regularly scheduled chapter meeting earlier in the week in lieu of having a meeting with the entire chapter when the Leadership Consultant is on campus. This will help to balance the chapter members’ time commitment.
    - **Schedule a meeting with the associate member class.**
  - If you are unable to schedule a meeting between one of the officers or key committee chairmen and the Leadership Consultant, be sure to communicate with the consultant PRIOR to his arrival.
3. **Complete the Seven Objectives of Chapter Excellence Report.** The Archon should fill out the Excel version of the report PRIOR to consultant’s arrival.

## DURING THE VISIT

During the Leadership Consultant’s visit, officers and key committee chairmen should:

- Be on time for meetings.
- Be open and honest about your chapter. Your Leadership Consultant is not visiting to “police” your chapter
- Have/bring the following items to their meetings (if scheduled for optional officers):
  - **Archon:** Seven Objectives of Chapter Excellence Report; strategic plan; chapter grade report
  - **Vice Archon:** recruitment plan; access to the current Dude’s List
  - **Treasurer:** budget; access to OmegaFi
  - **Secretary:** chapter calendar; constitution and bylaws
  - **Warden:** written associate member education program; member development plan
  - **Historian:** most recent and/or upcoming alumni newsletter; list of alumni events
  - **Chaplain:** calendar of subordinate rituals; plans for the Ritual of Initiation
  - **Risk Management Chairman:** written risk management procedures
  - **Standards Board Chairman:** Code of Conduct

- **Philanthropy Chairman:** Ability Experience program; calendar of awareness and fundraising events; volunteer hours log; names of members interested in national events
- **Scholarship Chairman:** scholarship program

Additionally, expect that your Leadership Consultant will NOT participate in activities that violate the Pi Kappa Phi Fraternity Risk Management Policy.

## **FOLLOWING THE VISIT**

1. Complete the Leadership Consultant evaluation.
2. Review the Chapter Visit Summary report, which will be e-mailed to your officers and key committee chairman after the consultant's visit, and ensure each item discussed is completed.
3. Follow up with your Chapter Relationship Manager at least once before the end of the semester to provide him/her with an updated copy of the Seven Objectives of Chapter Excellence report form.