



## COUNCIL OF ADVISORS OVERVIEW

### ROLE OF THE COUNCIL OF ADVISORS

The Council of Advisors provides support and guidance to the chapter and its officers and key committee chairmen to confirm stability and consistency term after term. An effective Council of Advisors supports chapter officers and key committee chairmen in developing leadership skills, creating goals and executing plans to achieve chapter excellence. Effective members of the Council of Advisors will consistently communicate with officers and key committee chairmen, provide mature adult guidance, connect students with appropriate Fraternity and university resources and collaborate with other members of the Council of Advisors to support the long-term success of the chapter.

### POSITIONS ON THE COUNCIL OF ADVISORS

- Chapter Advisor\*
- Alumni Relations Advisor
- Faculty Advisor (if required by the university)
- Financial Advisor\*
- Philanthropy Advisor
- Member Education Advisor\*
- Recruitment Advisor
- Ritual Advisor
- Scholarship Advisor
- Standards Board Advisor

*\*Required under Supreme Law*

### FREQUENTLY ASKED QUESTIONS

#### How much time is required as a member of the Council of Advisors?

Time commitments will vary based on the number of advisors, the needs of the chapter and, of course, your availability. While we ask that our advisors have a frequent presence with the chapter and its members, there is flexibility in how this is carried out based on your availability and the chapter's needs. Typically, this may range from a few times per month to a few hours per week. In some cases, advising may only take place during designated times throughout the year.

#### Do I need to be a member of Pi Kappa Phi in order to be on the Council of Advisors?

It is not required that you be a member to hold any position on the Council of Advisors, except for ritual advisor. Instead, we hope to find individuals from a variety of backgrounds and experiences to advise the chapter.

#### Can I advise from a distance?

With today's technology, it is easier than ever to advise remotely. While we do expect our advisors to communicate frequently and be present, this can be done via phone or virtually. Chapter advisors must live locally.

### **How long is my term of office?**

Members of the Council of Advisors are appointed by the chapter advisor and serve without fixed terms. The chapter advisor will collaborate with the National Headquarters staff to provide training and resources to each member of the Council of Advisors, as well as ongoing feedback. The chapter advisor will also work with the individual advisor to assess his/her desire to continue in the position.

## **CHAPTER ADVISOR PERFORMANCE EXPECTATIONS & BEST PRACTICES**

### **ROLE OF THE CHAPTER ADVISOR**

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The Chapter Advisor partners with officers and key committee chairmen, National Headquarters staff members, other volunteers and university staff members to help the chapter make intelligent, fair and reasonable choices within the boundaries established by state, federal and local laws, as well as Pi Kappa Phi's standards of conduct and the applicable policies of the university. Chapter advisors also provide student members with the appropriate amount of challenge and support to make decisions that advance the mission of both the chapter and the national organization. Chapter advisors are appointed by the undergraduate chapter with ratification by the chief executive officer or his designee.

### **PERFORMANCE EXPECTATIONS**

#### **Understand the National Fraternity, Chapter and Institution**

- Review *The Gold Book*, the Pi Kappa Phi Fraternity Risk Management Policy and other resources upon appointment.
- Attend a Chapter Advisor Symposium within one year of appointment.
- Meet with the campus fraternity/sorority life advisor at least once per term.
- Meet with the leadership consultant at least once per term.
- Recruit and train the scholarship advisor and the financial advisor.
- Sign all initiation cards before submission to the National Headquarters.
- *Participate in ongoing training and education opportunities.*
- *Maintain a Council of Advisors with at least five members.*

#### **Maintain Core Values and Model Appropriate Behavior**

- Abide by the Fraternity's Constitution and Supreme Laws.
- Abide by the Pi Kappa Phi Fraternity Risk Management Policy.
- Refrain from purchasing or providing alcohol to student members.
- Refrain from facilitating the consumption of alcohol by student members.
- Disclose any conflict of interest<sup>1</sup> to the National Headquarters.
- Refrain from using illegal drugs or other controlled substances.
- Refrain from engaging in romantic and/or sexual relationships with student members.
- Refrain from engaging in romantic and/or sexual relationships with Fraternity staff members with whom they have a volunteer-staff relationship.
- *Limit alcohol consumption in the presence of student members to no more than one drink per hour and three drinks in one sitting.*

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<sup>1</sup> A conflict of interest arises when a volunteer may benefit financially from a decision that s/he could make or influence in his/her position, including indirect benefits to family members of businesses with which the volunteer is closely associated.

- *Attend the chapter's Pre-Initiation ceremony and Ritual of Initiation (if a member) each term.*
- *Support the Pi Kappa Phi Foundation annually.*
- *Support The Ability Experience annually.*

#### **Build Rapport**

- Confirm an advisor is present for at least two Executive Council meetings each month.
- Make sure an advisor is present for at least two chapter meetings each month.
- Host meetings (in person or virtually) with the Council of Advisors at least once every other month to provide relevant updates on the chapter and/or national Fraternity.
- *Participate in the associate member education program.*
- *Attend chapter events as appropriate throughout the semester (e.g., Ability Experience events, Founders' Day activities, etc.).*
- *Confirm an advisor is present at each Executive Council meeting and chapter meeting.*

#### **Demonstrate Effective Communication and Listening Skills**

- Maintain a current email address and phone number with the National Headquarters.
- Communicate with the archon and other officers (as needed) at least once per week.
- Confirm all members of the Council of Advisors are in communication with the officer or key committee chairman they advise at least once every two weeks.
- Notify the National Headquarters, archon and members of the Council of Advisors of any extended periods of absence or availability.

#### **Demonstrate Coaching Skills and Provide Feedback**

- Make sure the chapter submits all administrative items and fees to the National Headquarters by the stated deadlines, including the IRS Form 990 and chapter budget. See the Year in the Life of a Pi Kappa Phi Chapter document for more information.
- Confirm the chapter submits all Ability Experience fundraising by the stated deadlines.
- Verify all associate members complete Health & Safety Edu prior to initiation by working with the warden to track completion throughout the semester.
- *Make sure the chapter utilizes the Officer Transition Plan, which is available on pikapp.org.*
- *Confirm the chapter hosts an Officer Transition Retreat after elections.*
- *Verify the chapter produces a calendar of events each term.*

#### **Inspire a Shared Vision**

- Make sure the Executive Council reviews the Leadership Consultant Visit Guide prior to the consultant's visit each term and follows up appropriately after their visit based on the Consultant Summary Report.
- *Attend the chapter's annual Recruitment Workshop and Strategic Planning Workshop.*
- *Assist the chapter in successfully implementing the written strategic plan.*

*Indicates a best practice, not an expectation.*

## **ALUMNI RELATIONS ADVISOR PERFORMANCE EXPECTATIONS & BEST PRACTICES**

### **ROLE OF THE ALUMNI RELATIONS ADVISOR**

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The alumni relations advisor assists in Pi Kappa Phi's endeavor of promoting lifelong brotherhood. This advisor works directly with the chapter historian and provides alumni with an avenue to get involved with the chapter and stay in touch with chapter activities.

### **PERFORMANCE EXPECTATIONS**

#### **Advice and Support for Officers/Key Committee Chairmen**

- Maintain regular communication with the historian
- Make sure the historian keeps the chapter's material up to date (i.e., website, newsletter, scrapbook, local history and documented events).
- Keep track of alumni news and current happenings (i.e., weddings, births, job changes, promotions, people moving, success stories).
- Provide alumni with an avenue to get involved with the chapter or its activities.

#### **Administrative Responsibilities**

- Confirm that the chapter produces at least one newsletter (e.g., parent, alumni, etc.) in an academic year.
- Verify that the chapter maintains at least one social media account (e.g., Facebook, LinkedIn, Instagram, etc.).
- Make sure that the chapter performs the Graduating Senior Ritual outlined in *The Gold Book*.

### **BEST PRACTICES**

- Confirm that at least two alumni newsletters are sent each year to all chapter alumni and the National Headquarters.
- If the chapter participates in the newsletter program offered by the National Headquarters, serve as the chapter's liaison.
- Encourage the chapter to host at least one additional event or program specifically for graduating seniors.
- Encourage the chapter to sponsor at least one alumni event per term.
- Work with the chapter's webmaster to have a website that is up-to-date, informative and appropriate.
- Serve as the primary contact person for chapter alumni and/or representative of the alumni chapter and housing corporation to contact when they have any news or major current events (i.e., baby, wedding, promotion, etc.).
- Educate the chapter on effectively communicating with chapter alumni about what is important to them.
- Educate the undergraduate members on the benefits of lifelong brotherhood in Pi Kappa Phi Fraternity.
- Serve as the liaison between the chapter and the alumni chapter/housing corporation, if one exists.

## **FACULTY ADVISOR PERFORMANCE EXPECTATIONS & BEST PRACTICES**

### **ROLE OF THE FACULTY ADVISOR**

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The faculty advisor must be a faculty or staff member at the college/university. The faculty advisor must understand the importance of academics, campus involvement and cultivating a diverse chapter. The faculty advisor serves as a liaison between the institution and the local chapter, promoting scholastic excellence and supporting the educational growth of the chapter.

### **PERFORMANCE EXPECTATIONS**

#### **Advice and Support for Officers/Key Committee Chairmen**

- Serve as a liaison to the university and identify the programs and resources offered by the university that can assist the chapter.
- Assist the chapter in managing and fulfilling requirements and regulations set forth by the university.
- As needed, the faculty advisor may also work with the chapter to assist in developing and implementing the chapter's scholarship program. In these cases, they should work closely with the chapter's scholarship advisor.

#### **Administrative Responsibilities**

- Assist the chapter in communicating with the university through the proper channels and understanding university requirements.
- Make sure the chapter meets the university's minimum expectations for campus involvement (if applicable).
- Assist the chapter in planning and hosting at least one presentation and/or workshop focused on member development during the academic year.

### **BEST PRACTICES**

- Openly support and promote the success of Pi Kappa Phi on campus.
- Review individual member scholastic achievement and offer support resources and services through the university/college.
- Educate the chapter on campus-wide scholastic programs and academic resources.
- Guide members in career decisions and identify different campus resources, services, contacts, etc., that will promote self-awareness and career discovery.
- Assist chapter members in becoming involved on campus and help to promote a healthy level of campus involvement within the chapter.
- Represent the Pi Kappa Phi chapter when appropriate during any university/college setting.
- Attend at least two chapter events each semester.
- Be available to meet with brothers individually when necessary.

## **FINANCIAL ADVISOR**

### **PERFORMANCE EXPECTATIONS & BEST PRACTICES**

#### **ROLE OF THE FINANCIAL ADVISOR**

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The financial advisor provides guidance to the undergraduate chapter on developing a consistent bookkeeping system and remaining current on financial obligations. This advisor confirms that the chapter operates on a sound financial basis and saves for the future.

#### **PERFORMANCE EXPECTATIONS**

##### **Advice and Support for Officers/Key Committee Chairmen**

- Meet with the treasurer a minimum of twice a semester to review the budget and expenditures of the chapter (once a month, preferred).
- Confirm that the chapter has sound budget and accounting practices, aligned with recommended “best practice” templates used by Pi Kappa Phi.
- Have a working understanding of OmegaFi (or whatever bookkeeping system is used by the chapter) and the role it plays in the chapter’s operations.
- The financial advisor should be listed as an administrator on chapter accounts, including OmegaFi.
- Review the financial statements provided by OmegaFi (or other bookkeeping system) and be familiar with the chapter’s financial status.
- Verify the budget is approved by the chapter each term/year before the start of the next term/year in which it takes effect.

##### **Administrative Responsibilities**

- Verify that the chapter has a current budget (semester or annual) on file with the National Headquarters.
- Make sure that the chapter operates without financial loss.
- Verify that the chapter completes and submits Form 990 to the Internal Revenue Service and that it is submitted to the National Headquarters.

#### **BEST PRACTICES**

- Attend the chapter meeting in which the budget is voted on by the chapter.
- Consistently review all expenditures of the chapter to make sure that priorities are maintained and that the chapter is operating in sound financial condition. The advisor should regularly provide feedback on ways to be more efficient with expenditures.
- Accounts receivable should be reviewed monthly. Where it is evident that the chapter is unable to control its accounts receivable, the financial advisor will exert whatever means are necessary to correct such problems, upon approval from the National Headquarters.
- Confirm that the chapter is placing a certain amount of money into some type of investment strategy each semester (a savings account is recommended).
- Make certain that an annual financial review is conducted of the chapter’s financial records.
- Support the collection of insurance, Initiation fees, Pre-Initiation fees and student dues and confirm they are sent to the National Headquarters on time.
- Make certain the chapter is current in its IFC and student organization dues, as well as with any other businesses or organizations.
- Confirm the chapter is utilizing the financial expulsion process (30/60/90), as required by Supreme Law. Understand this process in detail to advise the chapter on when this process takes place in a timely manner.
- Provide guidance on keeping chapter operations fundraising initiatives separate from The Ability Experience efforts, to confirm that funds are collected and accounted for properly.
- Verify that the chapter maintains chapter banking accounts separately between the physical

house fund, chapter fund, The Ability Experience fund and other savings accounts.

## **MEMBER EDUCATION ADVISOR PERFORMANCE EXPECTATIONS & BEST PRACTICES**

### **ROLE OF THE MEMBER EDUCATION ADVISOR**

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The member education advisor understands the importance of leading the chapter by example and developing a positive environment for the associate and initiated members. This advisor works directly with the warden and chaplain, advises the New Member Education Committee and supports the chapter's associate member education and ongoing member development program. The member education advisor confirms that the New Member Education Committee provides associate members with valuable learning opportunities that focus on the core values of Pi Kappa Phi, leadership development and self-awareness.

### **PERFORMANCE EXPECTATIONS**

#### **Advice and Support for Officers/Key Committee Chairmen**

- Help establish and advise the New Member Education Committee, made up of at least the warden, chaplain and two initiated members.
- Assist the chapter with integrating its local history with the resources provided by the National Headquarters.
- Meet at least two times per semester with associate members to support their learning process by facilitating discussion, answering questions and serving as a resource.
- Actively track the retention rate of associate members for the chapter.

#### **Administrative Responsibilities**

- Confirm the chapter has written member development and associate member education programs; both programs should be submitted to the National Headquarters annually.
- Verify that the associate member education program follows the program provided by the National Headquarters.
- Ensure the chapter conducts at least one subordinate ritual for associate members each term.
- Assist the chapter with planning at least one presentation and/or workshop focused on member development during the academic year.

### **BEST PRACTICES**

- Assist in the recruitment of chapter alumni and student affairs professionals to participate actively and positively in the member development and associate member education processes.
- Assess the progress of the associate members and offer feedback to the New Member Education Committee at least twice each term.
- If possible, meet with National Headquarters staff during scheduled visits.



## **PHILANTHROPY ADVISOR**

### **PERFORMANCE EXPECTATIONS & BEST PRACTICES**

#### **ROLE OF THE PHILANTHROPY ADVISOR**

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The philanthropy advisor works directly with the philanthropy chairman to plan and execute disability awareness, fundraising and volunteer events. The philanthropy advisor works closely with The Ability Experience's managing director of chapter services.

#### **PERFORMANCE EXPECTATIONS**

##### **Advice and Support for Officers/Key Committee Chairmen**

- Confirm the chapter hosts at least one revenue-generating event for The Ability Experience annually.
- Make sure the chapter hosts at least one awareness event each academic year.
- Serve as a resource for the philanthropy chairman and the Philanthropy Committee.
- Assist the chapter in maintaining a relationship with their Friendship Visit partner and provide support to help ensure the longevity of the partnership.
- Assist the chapter in applying for the Circle of Giving grant after each fundraising event.

##### **Administrative Responsibilities**

- Verify the philanthropy chairman is reported on Chapter Gateway.
- Confirm that the chapter is fundraising annually for The Ability Experience and that all The Ability Experience fundraising is submitted by the stated deadlines.
- Help the chapter apply for a Circle of Giving grant and host a check presentation to their partner.

#### **BEST PRACTICES**

- Communicate about The Ability Experience national events to the undergraduate members and encourage their participation.
- Assist the chapter in establishing a volunteer relationship with a local organization for people with disabilities.
- Promote The Ability Experience in the local community.
- Encourage participation in The Ability Experience national programming: Gear Up events, Journey of Hope and Ability Camps.
- Verify that the chapter is using the appropriate fundraising platform to collect fundraising.
- Encourage the chapter to maintain an average of at least one volunteer hour per member each term.

## **RECRUITMENT ADVISOR PERFORMANCE EXPECTATIONS & BEST PRACTICES**

### **ROLE OF THE RECRUITMENT ADVISOR**

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The recruitment advisor works closely with the vice archon to design a plan for the continuous recruitment of new members.

### **PERFORMANCE EXPECTATIONS**

#### **Advice and Support for Officers/Key Committee Chairmen**

- Advise the vice archon and meet or communicate regularly.
- Oversee the planning and implementation of the chapter's recruitment program, in conjunction with the vice archon.
- Assist the vice archon in ensuring the chapter is within 10 percent of the established growth as set by the National Headquarters each term.
- Confirm the chapter communicates its recruitment program with its leadership consultant regularly throughout the vice archon's term.
- Confirm the chapter hosts at least one Recruitment Workshop annually.
- Provide feedback on the chapter's recruitment program to support ongoing chapter growth.
- Meet with the vice archon at least twice per academic term.
- Encourage the vice archon to engage with members, alumni, the campus and the community to ensure the successful execution of the recruitment program.

#### **Administrative Responsibilities**

- Confirm the chapter is familiar with both Fraternity and university/IFC recruitment policies.
- Confirm all recruitment events and activities are alcohol-free.
- Confirm the chapter only recruits men who meet the minimum 2.70 (high school and/or college) GPA requirement.
- Confirm the chapter complies with the requirements for legacy recruitment outlined in Supreme Law I, Section 5.
- Confirm the chapter reports all newly pre-initiated associate members on Chapter Gateway and submits the appropriate fees within three days of the ceremony.

### **BEST PRACTICES**

- Attend at least one recruitment event per term.
- Assist the vice archon in facilitating the Recruitment Workshop each term.
- Works with the chapter advisor and the member education advisor on strategies for retaining associate members.

## RITUAL ADVISOR PERFORMANCE EXPECTATIONS & BEST PRACTICES

### ROLE OF THE RITUAL ADVISOR

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The ritual advisor supports the chaplain by ensuring the values and lessons taught in Pi Kappa Phi's Ritual of Initiation are exemplified in the everyday actions of chapter members. **The ritual advisor must be an initiated member of the Fraternity.** If the Council of Advisors has both a ritual advisor and a member education advisor, the two shall work together to support the execution of the chapter's subordinate rituals.

### PERFORMANCE EXPECTATIONS

#### Advice and Support for Officers/Key Committee Chairmen

- Attend Pre-Initiation and the Ritual of Initiation each term.
- Assist the chaplain with the planning and execution of the Ritual of Initiation and debrief.
- Confirm that the chapter's Ritual paraphernalia and equipment are stored and maintained appropriately.
- Confirm all subordinate rituals support the lesson taught in the Ritual of Initiation.
- Confirm the chapter adheres to the Fraternity's policy on alcohol-free associate member activities.
- Confirm the chapter adheres to the Fraternity's anti-hazing policy.

#### Administrative Responsibilities

- Confirm that the chapter conducts at least one subordinate ritual for associate members each term.

### BEST PRACTICES

- Assist the chapter in obtaining a church, Masonic temple or other appropriate location to perform the Ritual of Initiation or subordinate rituals on an ongoing basis.
- Assist the chapter in the identification and recruitment of alumni initiates.
- Assist the chapter with the performance of the Graduating Senior Ritual each term.
- Attend Certified Ritualist Training.

## **SCHOLARSHIP ADVISOR PERFORMANCE EXPECTATIONS & BEST PRACTICES**

### **ROLE OF THE SCHOLARSHIP ADVISOR**

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The scholarship advisor promotes the development of a comprehensive scholarship program to improve the academic success of the chapter. The scholarship advisor works directly with the scholarship chairman and committee.

### **PERFORMANCE EXPECTATIONS**

#### **Advice and Support for Officers/Key Committee Chairmen**

- Assist the scholarship chairman with the creation of a written scholarship program, including the design of awards and incentives to encourage scholastic achievement.
- Work with chapter members who have fallen below or are at risk of falling below the minimum academic expectations to create individual academic improvement plans.

#### **Administrative Responsibilities**

- Review individual member scholastic achievement and connect students with available campus resources.
- Make sure that the chapter maintains a term and cumulative chapter GPA of 2.70.

### **BEST PRACTICES**

- Guide members in career decisions and identify appropriate campus resources.
- Assist the chapter leadership in promoting and upholding grade requirements.
- Educate and promote membership in the Order of the Lamp.

## **STANDARDS BOARD ADVISOR PERFORMANCE EXPECTATIONS & BEST PRACTICES**

### **ROLE OF THE STANDARDS BOARD ADVISOR**

Pi Kappa Phi Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, lifelong friendship and social experiences. The standards board advisor supports the chapter's Standards Board in the proactive education of all members on the standards of the Fraternity, the implementation of Pi Kappa Phi's conduct process and the development of educational sanctions intended to prevent future violations.

### **PERFORMANCE EXPECTATIONS**

#### **Advice and Support for Officers/Key Committee Chairmen**

- Review the chapter's Code of Conduct.
- Assist the Standards Board chairman with the proactive education of all members on the chapter's Code of Conduct.
- Support the Standards Board in adhering to the conduct process outlined in Supreme Law IX and the chapter bylaws.
- Support the timely investigation and adjudication of all individual conduct cases.
- Assist with the training of the chapter's Standards Board each time new members join the board.
- Assist the Standards Board in the referral of sexual misconduct allegations to the director of membership accountability
- Assist the Standards Board with monitoring members' compliance with assigned sanctions.

#### **Administrative Responsibilities**

- Review documentation of each conduct case, including charge letter, meeting minutes and decision letter, for compliance with Supreme Law.
- Guide the chapter in submitting the required documentation to the National Headquarters following the suspension or expulsion of any member.

### **BEST PRACTICES**

- Review chapter bylaws each term for alignment with Supreme Law IX.
- Support standards board training at the beginning of each officer term.
- Check in monthly to review standards board cases for compliance with the conduct process.
- Attend Standards Board meetings as requested by the Standards Board chair to support complex or high-conflict cases.