



## CHAPTER ADVISORY BOARD CHAIRMAN

### BASIC FUNCTION:

The chairman of the Chapter Advisory Board (CAB) supervises the activities of the other Board members and keeps all parties informed of progress and developments concerning the chapter and General Fraternity. He works with the chapter president and vice president on the advisement of chapter matters and creation and execution of chapter strategic planning.

The chairman also works with the university to maintain relations between the chapter, the General Fraternity, and the fraternity and sorority life professional/dean of students.

### THINGS TO FOCUS ON AS CAB CHAIRMAN:

1. Schedule and preside over monthly meetings with the Chapter Advisory Board. In these meetings it is important to ensure that each CAB member is actively engaged with both the chapter and Phi Delta Theta's resources available to that CAB member.
2. Manage, with the assistance of the province president, the membership of the CAB. A strong, focused, and engaged CAB results in a strong and successful chapter.
3. Meets with the campus fraternity and sorority advisor at least once each semester to discuss the strengths, weaknesses, and opportunities for the chapter and campus community.
4. Work with the president and vice president to encourage that all **Chapter Greatness Checklist** and all Phi Delta Theta **Minimum Standards** are met and reported yearly.
5. Create and review monthly, with the executive committee, the chapter's **strategic plan** for the next three to five years.
6. Work with the president and vice president to schedule and plan for effective **officer transitions** and a **chapter retreat** each semester or as needed.
7. Report, at a minimum quarterly, to the province president on the progress of the chapter. An example of best practice is to send a "five things to know" monthly email to the province president.
8. Promote and incentivize chapter attendance at Phi Delta Theta's regional province retreats.
9. If applicable, engage in a relationship with the Housing Corporation so that both the CAB and House Corporation are working in conjunction to promote the success of the chapter through advisement and facility maintenance and upkeep.
10. Hold the chapter and its members accountable to Phi Delta Theta's values as set out in *The Bond*. Communicate frequently with the chapter leadership and general members on the expectations, policies, and values of Phi Delta Theta.

### VIEW MORE RESOURCES AT:

<https://www.phideltatheta.org/members/resources/volunteer-officers/cab-chairman/>



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## THE ACADEMIC ADVISER

### BASIC FUNCTION:

The responsibility of the academic adviser is to oversee the chapter and its operations in fulfilling its quest to live up to, and exceed in the second Cardinal Principle of the Fraternity: Sound Learning. This adviser will assist the chapter in establishing a culture aimed at achieving the academic success of the individual member and chapter.

### 10 THINGS TO FOCUS ON AS ACADEMIC ADVISER:

1. Meet with the scholarship chairman each semester to review expectations of the position and set academic goals for the chapter.
2. Review the scholarship section of the chapter's bylaws to ensure that member and Phikeia GPA standards align with the Fraternity's expectation that chapters maintain a cumulative 2.75 or above GPA.
3. Review or assist in the development of the chapter's scholarship program and encourage usage of the Fraternity's **three-strike scholarship program**.
4. Encourage a chapter academic competition that pairs members and Phikeias together to obtain better GPAs and rewards or incentivizes those who perform well or improve academically.
5. Encourage the scholarship chairman to schedule a time-management seminar for the chapter's members and Phikeias.
6. Work with the scholarship chairman to ensure that members are **completing individual academic goal sheets** each semester.
7. Encourage the collection of **mid-term grade reports** for all members and Phikeias. Once collected calculate the **chapter's mid-term grade point average** and compare to the semester's goals.
8. Promote the usage of campus resources such as writing centers, tutors, disability support services, and peer study groups for those whose mid-term reports reflect the need for additional assistance.
9. Once provided by the university, review the chapter's semester academic report and ensure scholarship program bylaws are enforced where necessary.
10. Promote a culture of learning beyond the classroom by encouraging student involvement, internships, and other various professional development opportunities.

### VIEW MORE RESOURCES AT:

<https://www.phideltatheta.org/members/resources/volunteer-officers/academic-adviser/>



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## ALUMNI RELATIONS ADVISER

### BASIC FUNCTION:

The responsibility of the alumni relations adviser is to oversee and help develop the chapter's alumni and parent relations programs, engaging these two important audiences in the chapter's operations. This adviser works directly with the chapter's alumni secretary.

### 10 THINGS TO FOCUS ON AS ALUMNI RELATIONS ADVISER:

1. Meet with the alumni relations chairman at the beginning of each semester and during the summer to review expectations of the position and set alumni and parent engagement goals for the chapter. Use the **Alumni Secretary Resource Guide**.
2. Organize alumni and parent contact information in order to effectively communicate with both audiences. Current alumni contact information lists can be acquired from Phi Delta Theta's General Headquarters and the college/university alumni association and should be cross-referenced with any lists the chapter maintains.
3. Work with alumni secretary to produce bi-annual newsletters (print and e-newsletter) to send to alumni and parents, highlighting chapter and alumni matters. Learn more about the **chapter newsletter service** that Phi Delta Theta offers.
4. Prior to all recruitment efforts, facilitate communication to alumni and parents to generate **new member referrals**, including legacies.
5. Work with alumni secretary and chapter leadership to schedule, coordinate, and execute key alumni and parent events throughout the year (alumni weekends, homecoming, parents weekend, Founders Day).
6. Identify platform and build calendar that allows distinguished alumni and parents to share their experiences and expertise as guest speakers (chapter dinners, chapter meetings, Phikeia meetings, recruitment events).
7. Help coordinate a mentorship program that allows undergraduate members to learn from alumni who have experience in an industry of interest.
8. Invite all alumni and parents to follow the chapter and the General Fraternity on their social media platforms, and encourage alumni secretary and public relations chairman to continually highlight chapter and alumni matters. Encourage alumni to create a profile on the **Phi Delt Network** app.
9. Serve as a liaison between the chapter and a local **alumni club** if present and encourage shared programming, connection opportunities, and events.
10. Help bring attention to the chapter by sharing key highlights and alumni successes with editors of **The Scroll** and the college/university alumni association.

### VIEW MORE RESOURCES AT:

<https://www.phideltatheta.org/members/resources/volunteer-officers/alumni-relations-adviser/>



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## PHIKEIA EDUCATION ADVISER

### BASIC FUNCTION:

The responsibilities of the Phikeia education adviser are to oversee and advise the chapter in the execution of a new member education process that aligns with Phi Delta Theta's zero-tolerance policy for hazing. This adviser works with the Phikeia educator and the Pallas committee to coach the chapter towards a consistently effective Phikeia education period grounded in the Fraternity's standardized programs.

### 10 THINGS TO FOCUS ON AS PHIKEIA EDUCATION ADVISER:

1. Meet with Phikeia educator each semester to review expectations of the position and the utilization of any **Minimum Standards** of the Phikeia education program such as the standardized **Induction**, **Big Brother**, and **Initiation** programs, and that all Phikeias complete the required three **PDT U modules**. The Phikeia education experience should be an affirming experience, free from hazing and any forms of high-risk behavior.
2. Review the Phikeia Educator Facilitators **Guide** discuss how the chapter's Phikeia education process effectively utilizes the outlined programs provided.
3. Review or assist in the development of the chapter's judicial board process in the event any high risk incidents arise. A three-strike program is recommended, with the third strike resulting in membership expulsion.
4. Discuss and establish expectations during a chapter meeting around Phi Delta Theta's **Risk Management Policy**, and zero-tolerance policy for hazing.
5. Attend the first Phikeia education meeting of each semester and share the Fraternity's stance on **Risk Management**, zero-tolerance policy for hazing, and the impact of Phi Delta Theta on your life.
6. Work with the Phikeia educator to provide a weekly Phikeia education progress report (during new member education) to the Chapter Advisory Board.
7. Assist the chapter in budgeting in a timely manner for Phikeia and initiation fees.
8. If possible, engage in the creation of a Phikeia mentoring program where alumni assist Phikeias in transition to college, résumé review, and soft-skills development.
9. Track, with the assistance of the Phikeia educator, the completion of the Phikeia education modules found within PDTU.
10. Work with the Phikeia educator, warden, and president to schedule a practice Initiation in advance of the formal initiation of any Phikeia.

### VIEW MORE RESOURCES AT:

<https://www.phideltatheta.org/members/resources/volunteer-officers/phikeia-education-adviser/>



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## THE RECRUITMENT ADVISER

### BASIC FUNCTION:

The responsibility of the recruitment adviser is to oversee the activities of the chapter's recruitment program. This adviser works directly with the chapter's recruitment chairman and recruitment committee.

### 10 THINGS TO FOCUS ON AS RECRUITMENT ADVISER:

1. Meet with the recruitment chairman at the beginning of each semester and during the summer to review expectations of the position and set membership recruitment goals for the chapter.
2. Reference and review the chapter's **recruitment trend chart** with the recruitment chairman to assist with the development of recruitment goals. When developing those goals, also take into consideration the average chapter size for fraternities on campus and determine the number of members that the chapter will graduate at the end of the year.
3. Review the new member recruitment section of the chapter's bylaws and, if not in place or updated, work with the chapter to develop and vote in a **values-based selection process** to utilize when considering individuals for membership.
4. Help build the chapter's recruitment plan that includes goals, marketing techniques and technologies, target audiences, recruitment education opportunities, parent outreach, budgets, calendar building and events, chapter expectations, and structures (committees/teams).
5. Review that the chapter's digital presence (website/social media) and other marketing materials (handouts, t-shirts, etc.) are effectively promoting the chapter—in a way that is in alignment with the values of Phi Delta Theta. Encourage the chapter to lead potential new members to **futurephidelt.org** to learn more about Phi Delta Theta and express their interest by filling out the online form.
6. Encourage the recruitment chairman to schedule a recruitment workshop for the chapter, attend the region's province retreat, and utilize campus and GHQ resources designed to enhance the execution of the chapter's recruitment plan.
7. Facilitate communication with the chapter's alumni to obtain potential **new member referrals**.
8. Become familiar with and utilize **ChapterBuilder** (a customer relationship management tool) to bring efficiency to the chapter's recruitment efforts.
9. Review and discuss the rules and policies of the Fraternity and university with the chapter on a recurring basis and before all formal recruitment processes.
10. Promote the **surveying of the chapter's newest members** to gather feedback about the current recruitment process and how to improve it.

### VIEW MORE RESOURCES AT:

<https://www.phideltatheta.org/members/resources/volunteer-officers/recruitment-adviser/>



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## RISK MANAGEMENT ADVISER

### BASIC FUNCTION:

The responsibilities of the risk management adviser is to oversee and advise the chapter in both the compliance and promotion of Phi Delta Theta's risk management policies and health and safety initiatives. This adviser works primarily with the chapter risk management adviser but may also frequently advise the warden, Phikeia educator, social (events) chair, and president.

### 10 THINGS TO FOCUS ON AS RISK MANAGEMENT ADVISER:

1. Meet with risk management and social chairs each semester to review expectations of their positions and to also discuss and understand the Phi Delta Theta's Risk Management **Policies, Packet, and Event Planning Forms**.
2. Meet with the warden and president each semester to review the chapter's judicial process and ensure that it is proactive in nature, utilized as appropriate, equitably accountable, and in alignment with Sections 154-156 of **The Code of Phi Delta Theta**.
3. Discuss, on a consistent basis, Phi Delta Theta's **Alcohol-Free Housing** and **zero-tolerance for hazing policies** as part of a broader discussion on the Fraternity's health and safety **initiatives**.
4. Advise that the chapter has a **crisis management plan** in place that is accessible to anyone in the chapter. If the chapter does not have a plan, work with the risk management chair to put one in place.
5. Assist in the submission of a minimum of six event planning forms yearly. Regardless of submission number, it is encouraged that any event meeting the criteria of an event, an **event planning form** should be submitted.
6. Work with the risk management chair to have the **risk management affidavit** signed and actively reviewed by all members by the deadline each semester as stated in the **Chapter Greatness Checklist**.
7. If applicable, work with the Housing Corporation to address any facility life-health-safety concerns or facility spaces and/or products that violate Phi Delta Theta's risk management policies including bars and large "party" rooms.
8. Work with the financial adviser, treasurer, and risk management chair to review the chapter's budget in regard to member insurance which is due each October 1 as outlined in the **Chapter Greatness Checklist**.
9. Meet with the chapter's house manager and Housing Corporation (if applicable) at least once per term/semester to review the chapter's comprehensive fire safety program and ensure that an emergency evacuation plan is in place.
10. If the chapter, or members, are actively violating Phi Delta Theta's policies seek out assistance from the province president for individual or chapter accountability and/or support via **The Code** or the **Amnesty Program**.

### VIEW MORE RESOURCES AT:

<https://www.phideltatheta.org/members/resources/volunteer-officers/risk-management-adviser/>



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## THE CAMPUS MENTOR

### BASIC FUNCTION:

The responsibility of the campus mentor is to assist the chapter in utilizing the campus and its resources to the best of its ability. This person serves as a liaison between the chapter and the institution and works to enhance the relationship between the institution's and chapter's missions. The campus mentor works directly with the chapter's president.

### 10 THINGS TO FOCUS ON AS CAMPUS MENTOR:

1. Encourage all members to join and be actively involved in at least one other campus organization and assist with tracking trends in brothers' involvement.
2. Meet with student conduct and fraternity/sorority professionals each semester in order to help chapter leaders understand and navigate campus policies.
3. Arrange academic support for members who fall below a 2.75 semester GPA and encourage, when appropriate, that members utilize any disability support services.
4. Connect the chapter to on-campus resources for educational opportunities. Example topics might include: mental health and wellness, alcohol and substance abuse, time management, relationship building, etc.
5. Assist the chapter in identifying high-performing students on campus who could be valuable additions to the chapter. Be willing to participate in the chapter's recruitment of new members.
6. Create awareness about recognition societies and awards at the university and its colleges, schools, or departments.
7. Create awareness about career fair opportunities and encourage members to visit the campus' career center. Track members' internship experiences and job placement details.
8. Identify and share campus gatherings and events that promote strong university, student, and community relations and encourage the chapter to actively participate.
9. Encourage graduating seniors to remain engaged with their alma mater after graduation and ensure that they have shared new contact information with the school and Fraternity.
10. Work with Chapter Advisory Board Chairman when developing and reviewing the chapter's strategic plans to promote its alignment with the mission and goals of the host institution.



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## THE FINANCIAL ADVISER

### BASIC FUNCTION:

The financial adviser focuses on the development and maintenance of a sound financial treasury for the chapter. This adviser works directly with the chapter's treasurer and finance committee.

### 10 THINGS TO FOCUS ON AS FINANCIAL ADVISER:

1. Meet with the treasurer at the beginning of each semester and during the summer to review expectations of the position and set the chapter's budget.
2. Review all **greekbill offerings** designed to assist the chapter in developing its budget, billing and collecting membership dues, and filing necessary annual tax form(s). Also, identify an entity that can perform an annual audit of the chapter's finances.
3. Alongside the treasurer and finance committee, assist in the development of the **chapter budget** each term to identify dues structure, revenues, and expenses.
4. Share budget details to inform all members of their financial obligations, deadlines for the upcoming term, and to help members understand how the chapter spends its money.
5. Work with Housing Corporation to annually update any housing contracts and deliver them to members and parents, and are signed no less than six months in advance of the contract's start date.
6. Advise that the treasurer is submitting all necessary items on the **Chapter Greatness Checklist** (insurance payment, conference payments, new member, initiation, and member dues, and zero balance by April 30).
7. Review chapter bylaws each semester to confirm that they accurately lay out financial obligations, due dates, and penalties for delinquency.
8. Work with the treasurer to establish a process that frequently shares member account receivables in order to create a culture of financial accountability.
9. Complete all **annual tax forms** on time in order to maintain the chapter's tax status as a non-profit organization. Failure to file timely for three consecutive years will result in the chapter losing its tax status.
10. Help develop chapter fundraising ideas that can bring in additional revenue for the chapter's budget.

### VIEW MORE RESOURCES AT:

<https://www.phideltatheta.org/members/resources/volunteer-officers/financial-adviser/>



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