

# Beta Advisory Team Operating Calendar

## August

Advisory Team	Undergrads
<ul style="list-style-type: none"> <li>❑ Meet with respective officers               <ul style="list-style-type: none"> <li>○ Review operating calendar</li> <li>○ Discuss possible goals</li> <li>○ Establish communication schedule</li> </ul> </li> <li>❑ Prepare for Fall Recruitment</li> <li>❑ Schedule chapter <a href="#">goal setting</a> meeting</li> <li>❑ Discuss with Leadership Consultant (LC) goals and dates for Fall visit(s)</li> <li>❑ Review the <a href="#">Year in the Life</a> document</li> <li>❑ Send representative to Housing Corps meeting to ensure communication between the groups</li> </ul>	<ul style="list-style-type: none"> <li>❑ Meet with Advisor</li> <li>❑ Set Semester <a href="#">calendar</a> <ul style="list-style-type: none"> <li>○ Recruitment calendar</li> <li>○ Pledge Education &amp; Initiation</li> <li>○ Rituals</li> <li>○ Academic calendar</li> <li>○ Elections</li> <li>○ Social calendar                   <ul style="list-style-type: none"> <li>▪ Alumni Events</li> <li>▪ Philanthropy and Service Events</li> <li>▪ Formal</li> <li>▪ Homecoming</li> <li>▪ Date parties</li> <li>▪ Other campus events</li> </ul> </li> </ul> </li> <li>❑ Prepare for Fall Recruitment               <ul style="list-style-type: none"> <li>○ Set calendar of events</li> <li>○ Recruitment <a href="#">Education / Workshops</a></li> <li>○ Establish and communicate <a href="#">Recruitment</a> structure/logistics</li> </ul> </li> <li>❑ Schedule chapter <a href="#">goal setting</a> meeting</li> <li>❑ General Fraternity Bills/Fees due on Aug 31</li> <li>❑ Discuss with Leadership Consultant (LC) goals and dates for Fall visit(s)</li> </ul>
Chapter Counselor	
<ul style="list-style-type: none"> <li>❑ Set Semester <a href="#">calendar</a> <ul style="list-style-type: none"> <li>○ Quarterly/Monthly Advisory team meetings</li> <li>○ Assign advisors to weekly chapter/exec/pledge meetings</li> </ul> </li> <li>❑ Connect with District Chief (DC) to discuss status/goals of the chapter</li> </ul>	
Financial Advisor	
<ul style="list-style-type: none"> <li>❑ Fall dues out</li> <li>❑ Approve Billhighway spending</li> <li>❑ Work with treasurer to ensure officers are following their budgets</li> </ul>	
Risk Management	
<ul style="list-style-type: none"> <li>❑ Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President)               <ul style="list-style-type: none"> <li>○ Syllabus week</li> <li>○ Beginning of year parties</li> </ul> </li> </ul>	
Recruitment	
<ul style="list-style-type: none"> <li>❑ Prepare for Fall Recruitment               <ul style="list-style-type: none"> <li>○ Set calendar of events</li> <li>○ Recruitment <a href="#">Education / Workshops</a></li> <li>○ Establish and communicate <a href="#">Recruitment</a> structure/logistics</li> </ul> </li> </ul>	
Education	
<ul style="list-style-type: none"> <li>❑ Use the <a href="#">PPEA</a> to review Pledge Program with Officer and District Chief</li> </ul>	



# Beta Advisory Team Operating Calendar

September	
Advisory Team	Undergrads
<ul style="list-style-type: none"> <li><input type="checkbox"/> Attend Advisory Team/Executive Committee Fall <a href="#">goal setting</a> retreat</li> <li><input type="checkbox"/> <a href="#">Assess Fall/Summer Recruitment</a> and discuss potential improvements</li> <li><input type="checkbox"/> Meet with LC</li> <li><input type="checkbox"/> Review chapter performance level expectations; SCOE, Sisson, Knox</li> <li><input type="checkbox"/> Maintain weekly communication with respective officers</li> <li><input type="checkbox"/> Attend chapter meeting(s) as assigned</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Meet with Advisor</li> <li><input type="checkbox"/> Risk Management                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Homecoming</li> <li><input type="checkbox"/> Socials / Mixers</li> </ul> </li> <li><input type="checkbox"/> Attend Advisory Team/Executive Committee Fall <a href="#">goal setting</a> retreat</li> <li><input type="checkbox"/> <a href="#">Assess Fall/Summer Recruitment</a> and discuss potential improvements</li> <li><input type="checkbox"/> Report <a href="#">Spring Grades on MyBeta</a> (Due Oct 1)</li> <li><input type="checkbox"/> Meet with LC</li> <li><input type="checkbox"/> (If school is on quarter system) General Fraternity Bills/Fees due on Sep 31</li> <li><input type="checkbox"/> Pledge Ceremonies</li> <li><input type="checkbox"/> Pledge Meetings</li> </ul>
Chapter Counselor	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule meeting with Greek Advisor to discuss chapter status</li> <li><input type="checkbox"/> Attend formal pledging ceremony</li> <li><input type="checkbox"/> Attend pledge class meeting to discuss advisor roles and meet pledges</li> </ul>	
Financial Advisor	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Work with treasurer to establish payment plans</li> <li><input type="checkbox"/> Approve Billhighway spending</li> <li><input type="checkbox"/> Work with treasurer to ensure officers are following their budgets</li> </ul>	
Risk Management	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President)                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Homecoming</li> <li><input type="checkbox"/> Socials / Mixers</li> </ul> </li> </ul>	
Recruitment	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Attend formal pledging ceremony</li> <li><input type="checkbox"/> <a href="#">Assess Fall Recruitment</a> and discuss potential improvements</li> </ul>	
Education	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Attend formal pledging ceremony</li> </ul>	



# Beta Advisory Team Operating Calendar

## October

Advisory Team	Undergrads
<ul style="list-style-type: none"> <li>❑ Discuss elections and finding a replacement with respective officers</li> <li>❑ Promote Winter Leadership Development Programs                             <ul style="list-style-type: none"> <li>○ <a href="#">Wooden Institute</a> (Registration deadline: Nov 15)</li> <li>○ <a href="#">FuturesQuest</a> (Registration deadline: Dec 1)</li> </ul> </li> <li>❑ Meet with LC</li> <li>❑ Attend pledge class meeting to discuss advisor roles and meet pledges</li> <li>❑ Maintain weekly communication with respective officers</li> <li>❑ Attend chapter meeting(s) as assigned</li> </ul>	<ul style="list-style-type: none"> <li>❑ Mid-Terms</li> <li>❑ Meet with Advisor</li> <li>❑ Risk Management                             <ul style="list-style-type: none"> <li>○ Homecoming</li> <li>○ Socials / Mixers</li> <li>○ Halloween</li> </ul> </li> <li>❑ Report Spring <a href="#">Grades on MyBeta</a> (Due Oct 1)</li> <li>❑ Meet with LC</li> <li>❑ Pledge Meetings</li> </ul>
<b>Chapter Counselor</b>	
<ul style="list-style-type: none"> <li>❑ Plan Monthly/Quarterly advisor meetings</li> </ul>	
<b>Financial Advisor</b>	
<ul style="list-style-type: none"> <li>❑ Work with treasurer to collect on payment plans</li> <li>❑ Approve Billhighway spending</li> <li>❑ Work with treasurer to ensure officers are following their budgets</li> </ul>	
<b>Risk Management</b>	
<ul style="list-style-type: none"> <li>❑ Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President)                             <ul style="list-style-type: none"> <li>○ Homecoming</li> <li>○ <a href="#">Halloween / appropriate costumes</a></li> <li>○ Socials/mixers</li> <li>○ Date Parties</li> </ul> </li> </ul>	
<b>Recruitment</b>	
<ul style="list-style-type: none"> <li>❑ Help assess Fall and start planning for Spring Recruitment</li> </ul>	
<b>Education</b>	
<ul style="list-style-type: none"> <li>❑ Work with Pledge Educator on weekly lesson plans</li> </ul>	



# Beta Advisory Team Operating Calendar

## November

Advisory Team	Undergrads
<ul style="list-style-type: none"> <li><input type="checkbox"/> Discuss elections and finding a replacement with respective officers</li> <li><input type="checkbox"/> Ensure new officers plan to attend <a href="#">Keystone</a></li> <li><input type="checkbox"/> Meet with members interested in holding an officer position</li> <li><input type="checkbox"/> Promote Winter Leadership Development Programs                             <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Wooden Institute</a> (Registration deadline: Nov 15)</li> <li><input type="checkbox"/> <a href="#">FuturesQuest</a> (Registration deadline: Dec 1)</li> </ul> </li> <li><input type="checkbox"/> Plan <a href="#">transition retreat</a> for incoming/outgoing officers with advisors</li> <li><input type="checkbox"/> Meet with LC</li> <li><input type="checkbox"/> Attend pledge class meeting to discuss advisor roles and meet pledges</li> <li><input type="checkbox"/> Maintain weekly communication with respective officers</li> <li><input type="checkbox"/> Attend chapter meeting(s) as assigned</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Thanksgiving</li> <li><input type="checkbox"/> Meet with Advisor</li> <li><input type="checkbox"/> Risk Management                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Formals</li> <li><input type="checkbox"/> Socials/mixers</li> <li><input type="checkbox"/> Date Parties</li> </ul> </li> <li><input type="checkbox"/> Elections</li> <li><input type="checkbox"/> Plan for <a href="#">Keystone</a> Attendance</li> <li><input type="checkbox"/> Plan for Initiation</li> <li><input type="checkbox"/> Meet with LC</li> <li><input type="checkbox"/> Pledge Meetings</li> <li><input type="checkbox"/> Prepare for Initiation</li> </ul>
<h3>Chapter Counselor</h3>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Plan Monthly/Quarterly advisor meetings</li> </ul>	
<h3>Financial Advisor</h3>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Work with treasurer to collect on payment plans</li> <li><input type="checkbox"/> Approve Billhighway spending</li> <li><input type="checkbox"/> Work with treasurer to ensure officers are following their budgets</li> </ul>	
<h3>Risk Management</h3>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President)                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Formals</li> <li><input type="checkbox"/> Socials/mixers</li> <li><input type="checkbox"/> Date Parties</li> </ul> </li> </ul>	
<h3>Recruitment</h3>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Plan for Spring Recruitment</li> </ul>	
<h3>Education</h3>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Work with Pledge Educator on weekly lesson plans</li> <li><input type="checkbox"/> Help plan for Initiation</li> </ul>	



# Beta Advisory Team Operating Calendar

December	
Advisory Team	Undergrads
<ul style="list-style-type: none"> <li><input type="checkbox"/> Assess Fall semester progress and goals</li> <li><input type="checkbox"/> Meet with new officers</li> <li><input type="checkbox"/> Enjoy the Holidays!</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Finals</li> <li><input type="checkbox"/> Initiation</li> <li><input type="checkbox"/> Register for <a href="#">Keystone</a></li> <li><input type="checkbox"/> Winter Break</li> </ul>
Chapter Counselor	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Plan Monthly/Quarterly advisor meetings</li> </ul>	
Financial Advisor	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Work with treasurer to make sure all members are paid in full</li> <li><input type="checkbox"/> Approve Billhighway spending</li> <li><input type="checkbox"/> Work with treasurer to ensure officers are following their budgets</li> </ul>	
Risk Management	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President)</li> </ul>	
Recruitment	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Plan for Spring Recruitment</li> </ul>	
Education	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Help plan for Initiation</li> </ul>	

# Beta Advisory Team Operating Calendar

## December/January

### Advisory Team

- ❑ Discuss transitions of new officer and executive committee
- ❑ Attend [transition retreat](#) for incoming/outgoing officers and advisors
- ❑ Meet with new respective officers
  - Review operating calendar
  - Discuss possible goals
  - Establish communication schedule
- ❑ Ensure officers are registering for [Keystone](#) (Registration deadline: Jan 20)
- ❑ Set Semester calendar
  - Quarterly/Monthly Advisory team meetings
  - Assign advisors to weekly chapter/exec meetings
- ❑ Prepare for Spring Recruitment
- ❑ Schedule chapter [goal setting](#) meeting

### Chapter Counselor

### Financial Advisor

- ❑ Approve Billhighway spending
- ❑ Work with treasurer to ensure officers are following their budgets

### Risk Management

### Recruitment

- ❑ Prepare for Spring Recruitment
  - Set calendar of events
  - Recruitment [Education / Workshops](#)
  - Establish and communicate [Recruitment](#) structure/logistics

### Education

- ❑ Help plan for Initiation
- ❑ Use the [PPEA](#) to review Pledge Program with Officer and District Chief

### Undergrads

- ❑ Set Semester calendar
  - Recruitment calendar
  - Pledge Education & Initiation
  - Rituals
  - Academic calendar
  - Social calendar
    - Alumni Events
    - Philanthropy and Service Events
    - Formal
    - Greek Week
    - Spring Break
    - Date parties
    - Other campus events
- ❑ Prepare for Spring Recruitment
  - Set calendar of events
  - Recruitment [Education / Workshops](#)
  - Establish and communicate [Recruitment](#) structure/logistics
- ❑ Report new officers on [MyBeta](#)
- ❑ Register for [Keystone](#)



# Beta Advisory Team Operating Calendar

## January

Advisory Team	Undergrads
<ul style="list-style-type: none"> <li>❑ Ensure officers are registering for <a href="#">Keystone</a> (Registration deadline: Jan 20)</li> <li>❑ Discuss with LC goals and dates for Spring visit(s)</li> <li>❑ Attend/support chapter recruitment events as needed</li> <li>❑ Send representative to Housing Corps meeting to ensure communication between the groups</li> <li>❑ Meet with LC</li> <li>❑ Attend pledge class meeting to discuss advisor roles and meet pledges</li> <li>❑ Maintain weekly communication with respective officers</li> <li>❑ Attend chapter meeting(s) as assigned</li> </ul>	<ul style="list-style-type: none"> <li>❑ Meet with Advisor</li> <li>❑ Set Semester calendar               <ul style="list-style-type: none"> <li>○ Recruitment calendar</li> <li>○ Pledge Education &amp; Initiation</li> <li>○ Rituals</li> <li>○ Academic calendar</li> <li>○ Social calendar                   <ul style="list-style-type: none"> <li>▪ Alumni Events</li> <li>▪ Philanthropy and Service Events</li> <li>▪ Formal</li> <li>▪ Greek Week</li> <li>▪ Spring Break</li> <li>▪ Date parties</li> <li>▪ Other campus events</li> </ul> </li> </ul> </li> <li>❑ Prepare for Spring Recruitment               <ul style="list-style-type: none"> <li>○ Set calendar of events</li> <li>○ Recruitment <a href="#">Education / Workshops</a></li> <li>○ Establish and communicate <a href="#">Recruitment</a> structure/logistics</li> </ul> </li> <li>❑ Register for <a href="#">Keystone</a> (Deadline: Jan 20)</li> <li>❑ General Fraternity Bills/Fees due on Jan 31</li> <li>❑ Report new officers on <a href="#">MyBeta</a></li> <li>❑ Pledge Induction</li> <li>❑ Pledge Meetings</li> </ul>
Chapter Counselor	
<ul style="list-style-type: none"> <li>❑ Set Semester <a href="#">calendar</a> <ul style="list-style-type: none"> <li>○ Quarterly/Monthly Advisory team meetings</li> <li>○ Assign advisors to weekly chapter/exec/pledge meetings</li> </ul> </li> <li>❑ Connect with District Chief (DC) to discuss status/goals of the chapter</li> </ul>	
Financial Advisor	
<ul style="list-style-type: none"> <li>❑ Spring Dues out</li> <li>❑ Plan a financial responsibility presentation/workshop with treasurer</li> <li>❑ Approve Billhighway spending</li> <li>❑ Work with treasurer to ensure officers are following their budgets</li> </ul>	
Risk Management	
<ul style="list-style-type: none"> <li>❑ Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President)               <ul style="list-style-type: none"> <li>○ Syllabus week</li> <li>○ Beginning of semester parties</li> </ul> </li> </ul>	
Recruitment	
<ul style="list-style-type: none"> <li>❑ Spring Recruitment</li> </ul>	
Education	
<ul style="list-style-type: none"> <li>❑ Discuss New Pledge Educator's ideas for the program</li> </ul>	



# Beta Advisory Team Operating Calendar

## February

Advisory Team	Undergrads
<ul style="list-style-type: none"> <li>❑ Attend <a href="#">Keystone Regional Leadership Conference</a></li> <li>❑ Promote giving to the <a href="#">Sons of the Dragon Club</a></li> <li>❑ Meet with LC</li> <li>❑ Attend pledge class meeting to discuss advisor roles and meet pledges</li> <li>❑ Maintain weekly communication with respective officers                             <ul style="list-style-type: none"> <li>○ Discuss progress on officer transitions</li> </ul> </li> <li>❑ Attend chapter meeting(s) as assigned</li> </ul>	<ul style="list-style-type: none"> <li>❑ Meet with Advisor</li> <li>❑ Attend <a href="#">Keystone Regional Leadership Conference</a></li> <li>❑ Give to the <a href="#">Sons of the Dragon Club</a> (By April 1)</li> <li>❑ Report Fall Grades on <a href="#">MyBeta</a> (Due March 1)</li> <li>❑ General Fraternity <a href="#">Awards</a> due April 15</li> <li>❑ <a href="#">Assess Spring Recruitment</a> and discuss potential improvements</li> <li>❑ Individuals can apply for <a href="#">Merit Scholarships</a> (Due April 15)</li> <li>❑ Meet with LC</li> <li>❑ Risk Management                             <ul style="list-style-type: none"> <li>○ Formals</li> <li>○ Socials/mixers</li> <li>○ Date Parties</li> </ul> </li> <li>❑ Pledge meetings</li> </ul>
<b>Chapter Counselor</b>	
<ul style="list-style-type: none"> <li>❑ Plan Monthly/Quarterly advisor meetings</li> </ul>	
<b>Financial Advisor</b>	
<ul style="list-style-type: none"> <li>❑ Work with treasurer to establish payment plans</li> <li>❑ Host financial responsibility presentation/workshop</li> <li>❑ Approve Billhighway spending</li> <li>❑ Work with treasurer to ensure officers are following their budgets</li> </ul>	
<b>Risk Management</b>	
<ul style="list-style-type: none"> <li>❑ Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President)                             <ul style="list-style-type: none"> <li>○ Formals</li> <li>○ Socials/mixers</li> <li>○ Date Parties</li> </ul> </li> </ul>	
<b>Recruitment</b>	
<ul style="list-style-type: none"> <li>❑ <a href="#">Assess Spring Recruitment</a> and discuss potential improvements</li> </ul>	
<b>Education</b>	
<ul style="list-style-type: none"> <li>❑ Discuss New Pledge Educator's ideas for the program</li> <li>❑ Work with Pledge Educator on weekly lesson plans</li> </ul>	





# Beta Advisory Team Operating Calendar

## March

Advisory Team	Undergrads
<ul style="list-style-type: none"> <li>❑ Promote summer leadership development programs (All deadlines: April 15)               <ul style="list-style-type: none"> <li>○ <a href="#">Wooden Institute</a></li> <li>○ <a href="#">UIFI</a></li> <li>○ <a href="#">General Convention / Leadership College</a></li> </ul> </li> <li>❑ Promote giving to the <a href="#">Sons of the Dragon Club</a></li> <li>❑ Meet with LC</li> <li>❑ Attend pledge class meeting to discuss advisor roles and meet pledges</li> <li>❑ Maintain weekly communication with respective officers</li> <li>❑ Attend chapter meeting(s) as assigned</li> </ul>	<ul style="list-style-type: none"> <li>❑ Mid-terms</li> <li>❑ Register for summer leadership development programs (All deadlines: April 15)               <ul style="list-style-type: none"> <li>○ <a href="#">Wooden Institute</a></li> <li>○ <a href="#">UIFI</a></li> <li>○ <a href="#">General Convention / Leadership College</a></li> </ul> </li> <li>❑ Give to the <a href="#">Sons of the Dragon Club</a> (By April 1)</li> <li>❑ Apply for <a href="#">Men of Principle Grant</a> (Due April 15)</li> <li>❑ Chapter should review budget and discuss potential changes</li> <li>❑ General Fraternity <a href="#">Awards</a> (Due April 15)</li> <li>❑ Individuals can apply for <a href="#">Merit Scholarships</a> (Due April 15)</li> <li>❑ Risk Management               <ul style="list-style-type: none"> <li>○ Formals</li> <li>○ Greek Week</li> <li>○ Spring Break</li> <li>○ Socials/mixers</li> <li>○ Date Parties</li> </ul> </li> <li>❑ Meet with LC</li> <li>❑ Pledge meetings</li> </ul>
<h3>Chapter Counselor</h3>	
<ul style="list-style-type: none"> <li>❑ Plan Monthly/Quarterly advisor meetings</li> </ul>	
<h3>Financial Advisor</h3>	
<ul style="list-style-type: none"> <li>❑ Work with treasurer to collect on payment plans</li> <li>❑ Review budget with treasurer and discuss potential changes</li> <li>❑ Approve Billhighway spending</li> <li>❑ Work with treasurer to ensure officers are following their budgets</li> </ul>	
<h3>Risk Management</h3>	
<ul style="list-style-type: none"> <li>❑ Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President) in preparation for:               <ul style="list-style-type: none"> <li>○ Formals</li> <li>○ Greek Week</li> <li>○ Spring Break</li> <li>○ Socials/mixers/Date Party</li> </ul> </li> </ul>	
<h3>Recruitment</h3>	
<ul style="list-style-type: none"> <li>❑ <a href="#">Assess Spring Recruitment</a> and discuss potential improvements</li> </ul>	
<h3>Education</h3>	
<ul style="list-style-type: none"> <li>❑ Work with Pledge Educator on weekly lesson plans</li> </ul>	



# Beta Advisory Team Operating Calendar

## April

Advisory Team	Undergrads
<ul style="list-style-type: none"> <li><input type="checkbox"/> Promote summer leadership development programs (All deadlines: April 15)                             <ul style="list-style-type: none"> <li><a href="#">Wooden Institute</a></li> <li><a href="#">UIFI</a></li> <li><a href="#">General Convention / Leadership College</a></li> </ul> </li> <li><input type="checkbox"/> Promote giving to the <a href="#">Sons of the Dragon Club</a></li> <li><input type="checkbox"/> Meet with LC</li> <li><input type="checkbox"/> Attend pledge class meeting to discuss advisor roles and meet pledges</li> <li><input type="checkbox"/> Maintain weekly communication with respective officers</li> <li><input type="checkbox"/> Attend chapter meeting(s) as assigned</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Plan for Initiation</li> <li><input type="checkbox"/> Register for summer leadership development programs (All deadlines: April 15)                             <ul style="list-style-type: none"> <li><a href="#">Wooden Institute</a></li> <li><a href="#">UIFI</a></li> <li><a href="#">General Convention / Leadership College</a></li> </ul> </li> <li><input type="checkbox"/> Give to the <a href="#">Sons of the Dragon Club</a> (By April 1)</li> <li><input type="checkbox"/> Apply for <a href="#">Men of Principle Grant</a> (Due April 15)</li> <li><input type="checkbox"/> Chapter should review budget and discuss potential changes</li> <li><input type="checkbox"/> General Fraternity <a href="#">Awards</a> (Due April 15)</li> <li><input type="checkbox"/> Individuals can apply for <a href="#">Merit Scholarships</a> (Due April 15)</li> <li><input type="checkbox"/> Promote Men of Principle Scholarship</li> <li><input type="checkbox"/> Risk Management                             <ul style="list-style-type: none"> <li>Formals</li> <li>Greek Week</li> <li>Spring Break</li> <li>Socials/mixers</li> <li>Date Parties</li> </ul> </li> <li><input type="checkbox"/> Prepare for Summer Recruitment                             <ul style="list-style-type: none"> <li>Set calendar of events</li> <li>Recruitment Education / Workshops</li> <li>Establish and communicate Recruitment structure/logistics</li> </ul> </li> <li><input type="checkbox"/> Meet with LC</li> <li><input type="checkbox"/> Pledge meetings</li> </ul>
<b>Chapter Counselor</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Plan Monthly/Quarterly advisor meetings</li> </ul>	
<b>Financial Advisor</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Work with treasurer to collect on payment plans</li> <li><input type="checkbox"/> Review budget with treasurer and discuss potential changes</li> <li><input type="checkbox"/> Approve Billhighway spending</li> <li><input type="checkbox"/> Work with treasurer to ensure officers are following their budgets</li> </ul>	
<b>Risk Management</b>	
○	
<input type="checkbox"/>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President) in preparation for:                             <ul style="list-style-type: none"> <li>Formals</li> <li>Greek Week</li> <li>Spring Break</li> <li>Socials/mixers</li> <li>Date Parties</li> </ul> </li> </ul>	
○	
<b>Plan Summer Recruitment</b>	



# Beta Advisory Team Operating Calendar

May	
Advisory Team	Undergrads
<ul style="list-style-type: none"> <li><input type="checkbox"/> Assess Spring semester progress and goals</li> <li><input type="checkbox"/> Do Advisory team and <a href="#">self-evaluation</a></li> <li><input type="checkbox"/> Notify Chapter Counselor by June 1 of your intentions to stay with/ leave the team</li> <li><input type="checkbox"/> Maintain weekly communication with respective officers</li> <li><input type="checkbox"/> Attend chapter meeting(s) as assigned</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Final Exams</li> <li><input type="checkbox"/> Graduation</li> <li><input type="checkbox"/> Senior Send-off</li> <li><input type="checkbox"/> Plan for Initiation</li> <li><input type="checkbox"/> Promote Men of Principle Scholarship</li> <li><input type="checkbox"/> Chapter should review budget and decide on changes (FY starts July 1)</li> <li><input type="checkbox"/> Register for summer leadership development programs                             <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">General Convention</a> / <a href="#">Leadership College</a> (Late registration costs more)</li> </ul> </li> <li><input type="checkbox"/> Review budget and decide on changes (FY starts July 1)</li> <li><input type="checkbox"/> Prepare for Summer Recruitment                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Set calendar of events</li> <li><input type="checkbox"/> Recruitment <a href="#">Education / Workshops</a></li> <li><input type="checkbox"/> Establish and communicate <a href="#">Recruitment</a> structure/logistics</li> </ul> </li> <li><input type="checkbox"/> Pledge meetings</li> </ul>
Chapter Counselor	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Plan Summer meetings</li> </ul>	
Financial Advisor	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Work with treasurer to make sure all members are paid in full</li> <li><input type="checkbox"/> Review budget with treasurer and discuss potential changes</li> <li><input type="checkbox"/> Approve Billhighway spending</li> <li><input type="checkbox"/> Work with treasurer to ensure officers are following their budgets</li> </ul>	
Risk Management	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Review risk management <a href="#">policy</a> and incident reporting <a href="#">procedure</a> (with Risk Manager and Chapter President)                             <ul style="list-style-type: none"> <li><input type="checkbox"/> End of year/graduation parties</li> </ul> </li> </ul>	
Recruitment	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare for Summer Recruitment                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Set calendar of events</li> <li><input type="checkbox"/> Recruitment <a href="#">Education / Workshops</a></li> <li><input type="checkbox"/> Establish and communicate <a href="#">Recruitment</a> structure/logistics</li> </ul> </li> </ul>	
Education	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Work with Pledge Educator to plan for Initiation</li> </ul>	

# Beta Advisory Team Operating Calendar

## June/July/August

### Advisory Team

- ❑ All Fees and Assessments must be paid by July 31.
- ❑ Attend General Convention
- ❑ Reach out to LC with any questions/concerns

### Chapter Counselor

- ❑ Attend Chapter Counselor meetings scheduled by Greek Advisor (if applicable)

### Financial Advisor

- ❑ All Fees and Assessments must be paid by July 31
- ❑ FY ends June 30
- ❑ Work with treasurer to make sure all members are paid in full
- ❑ Review budget with treasurer and discuss potential changes
- ❑ Approve Billhighway spending
- ❑ Work with treasurer to ensure officers are following their budgets

### Risk Management

- ❑ (If chapter is housed and has occupants during summer) Review risk management [policy](#) and incident reporting [procedure](#) with live-in Risk Manager

### Recruitment

- ❑ Summer Recruitment

### Education

### Undergrads

- ❑ Summer Recruitment
- ❑ Chapter should have a zero balance with the General Fraternity by July 31.
- ❑ Attend leadership development programs:
  - [Wooden Institute](#)
  - [UIFI](#)
  - [General Convention](#) / [Leadership College](#)

