August Advisory Team Undergrads Meet with respective officers Meet with Advisor Review operating calendar Set Semester calendar Discuss possible goals Recruitment calendar **Establish communication** Pledge Education & Initiation schedule Rituals □ Prepare for Fall Recruitment o Academic calendar □ Schedule chapter goal setting meeting Elections Discuss with Leadership Consultant Social calendar (LC) goals and dates for Fall visit(s) Alumni Events □ Review the <u>Year in the Life</u> document Philanthropy and Service □ Send representative to Housing Corps **Events** meeting to ensure communication Formal between the groups Homecoming **Chapter Counselor** Date parties Other campus events Set Semester calendar □ Prepare for Fall Recruitment Quarterly/Monthly Advisory team meetings Set calendar of events Recruitment Education / Workshops Assign advisors to weekly chapter/exec/pledge meetings Establish and communicate **Recruitment structure/logistics** □ Connect with District Chief (DC) to □ Schedule chapter goal setting meeting discuss status/goals of the chapter ☐ General Fraternity Bills/Fees due on Aug 31 **Financial Advisor** Discuss with Leadership Consultant (LC) □ Fall dues out goals and dates for Fall visit(s) □ Approve Billhighway spending ■ Work with treasurer to ensure officers are following their budgets Risk Management Review risk management policy and incident reporting procedure (with Risk Manager and Chapter President) Syllabus week Beginning of year parties Recruitment □ Prepare for Fall Recruitment Set calendar of events Recruitment Education / Workshops o Establish and communicate Recruitment structure/logistics **Education** Use the PPEA to review Pledge Program with Officer and District Chief



September **Advisory Team Undergrads** Attend Advisory Team/Executive Meet with Advisor Committee Fall goal setting retreat Risk Management □ Assess Fall/Summer Recruitment and Homecoming discuss potential improvements Socials / Mixers Meet with LC □ Attend Advisory Team/Executive □ Review chapter performance level Committee Fall goal setting retreat expectations; SCOE, Sisson, Knox Assess Fall/Summer Recruitment and Maintain weekly communication with discuss potential improvements respective officers □ Report Spring Grades on MyBeta (Due Attend chapter meeting(s) as assigned Oct 1) **Chapter Counselor** Meet with LC ☐ (If school is on quarter system) General □ Schedule meeting with Greek Advisor to Fraternity Bills/Fees due on Sep 31 discuss chapter status Pledge Ceremonies Attend formal pledging ceremony ☐ Attend pledge class meeting to discuss Pledge Meetings advisor roles and meet pledges **Financial Advisor** □ Work with treasurer to establish payment plans ☐ Approve Billhighway spending ■ Work with treasurer to ensure officers are following their budgets **Risk Management** Review risk management policy and incident reporting procedure (with Risk Manager and Chapter President) Homecoming Socials / Mixers Recruitment Attend formal pledging ceremony Assess Fall Recruitment and discuss potential improvements **Education**



Attend formal pledging ceremony

October **Advisory Team Undergrads** Discuss elections and finding a Mid-Terms replacement with respective officers Meet with Advisor Promote Winter Leadership Development ■ Risk Management **Programs** Homecoming Wooden Institute (Registration Socials / Mixers deadline: Nov 15) Halloween o FuturesQuest (Registration □ Report Spring <u>Grades on MyBeta</u> (Due deadline: Dec 1) Oct 1) Meet with LC Meet with LC □ Attend pledge class meeting to discuss Pledge Meetings advisor roles and meet pledges Maintain weekly communication with respective officers □ Attend chapter meeting(s) as assigned **Chapter Counselor** □ Plan Monthly/Quarterly advisor meetings **Financial Advisor** Work with treasurer to collect on payment plans ☐ Approve Billhighway spending ■ Work with treasurer to ensure officers are following their budgets **Risk Management** Review risk management policy and incident reporting procedure (with Risk Manager and Chapter President) Homecoming o <u>Halloween / appropriate</u> costumes Socials/mixers **Date Parties** □ Help assess Fall and start planning for **Spring Recruitment**



Education

lesson plans

Work with Pledge Educator on weekly

November **Advisory Team Undergrads** Discuss elections and finding a replacement Thanksgiving with respective officers Meet with Advisor ☐ Ensure new officers plan to attend Keystone ■ Risk Management ☐ Meet with members interested in holding an o Formals officer position Socials/mixers Promote Winter Leadership Development Date Parties Elections **Programs** o Wooden Institute (Registration □ Plan for <u>Keystone</u> Attendance deadline: Nov 15) Plan for Initiation o <u>FuturesQuest</u> (Registration deadline: Meet with LC Dec 1) Pledge Meetings Plan transition retreat for Prepare for Initiation incoming/outgoing officers with advisors Meet with LC □ Attend pledge class meeting to discuss advisor roles and meet pledges Maintain weekly communication with respective officers □ Attend chapter meeting(s) as assigned **Chapter Counselor** □ Plan Monthly/Quarterly advisor meetings **Financial Advisor** □ Work with treasurer to collect on payment □ Approve Billhighway spending □ Work with treasurer to ensure officers are following their budgets **Risk Management** Review risk management policy and incident reporting procedure (with Risk Manager and **Chapter President)** o Formals Socials/mixers **Date Parties** Recruitment Plan for Spring Recruitment **Education** Work with Pledge Educator on weekly lesson Help plan for Initiation



December					
Advisory Team		Undergrads			
	Assess Fall semester progress and goals		Finals		
	Meet with new officers		Initiation		
	Enjoy the Holidays!		Register for <u>Keystone</u>		
Chapter Counselor			Winter Break		
	Plan Monthly/Quarterly advisor meetings				
Financial Advisor					
	Work with treasurer to make sure all				
	members are paid in full				
	Approve Billhighway spending				
	Work with treasurer to ensure officers				
	are following their budgets				
Risk Management					
	Review risk management policy and				
	incident reporting <u>procedure</u> (with Risk				
	Manager and Chapter President)				
Recruitment					
	Plan for Spring Recruitment				
Educat	ion				
	Help plan for Initiation				



December/January						
Adviso	ory Team	Undergrads				
	Discuss transitions of new officer and	□ Set Semester calendar				
	executive committee	 Recruitment calendar 				
	Attend transition retreat for	 Pledge Education & Initiation 				
	incoming/outgoing officers and	o Rituals				
	advisors	 Academic calendar 				
	Meet with new respective officers	 Social calendar 				
	 Review operating calendar 	■ Alumni Events				
	 Discuss possible goals 	Philanthropy and Service				
	 Establish communication 	Events				
	schedule	■ Formal				
	Ensure officers are registering for	■ Greek Week				
	Keystone (Registration deadline: Jan	■ Spring Break				
	20)	Date parties				
	Set Semester calendar	Other campus events				
	 Quarterly/Monthly Advisory 	Prepare for Spring Recruitment				
	team meetings	 Set calendar of events 				
	 Assign advisors to weekly 	 Recruitment <u>Education / Workshops</u> 				
	chapter/exec meetings	 Establish and communicate 				
	Prepare for Spring Recruitment	Recruitment structure/logistics				
	Schedule chapter goal setting meeting	 Report new officers on <u>MyBeta</u> 				
Chapte	er Counselor	Register for <u>Keystone</u>				
Financ	ial Advisor					
	Approve Billhighway spending					
	Work with treasurer to ensure officers					
	are following their budgets					
Risk M	lanagement					
Recruit	tment					
	Prepare for Spring Recruitment					
	 Set calendar of events 					
	 Recruitment <u>Education /</u> 					
	<u>Workshops</u>					
	 Establish and communicate 					
	Recruitment structure/logistics					
Educat						
	Help plan for Initiation					
	Use the PPEA to review Pledge Program					
	with Officer and District Chief					



January **Advisory Team Undergrads**

- Ensure officers are registering for Keystone (Registration deadline: Jan
- □ Discuss with LC goals and dates for Spring visit(s)
- □ Attend/support chapter recruitment events as needed
- Send representative to Housing Corps meeting to ensure communication between the groups
- Meet with LC
- □ Attend pledge class meeting to discuss advisor roles and meet pledges
- Maintain weekly communication with respective officers
- □ Attend chapter meeting(s) as assigned

Chapter Counselor

- Set Semester calendar
 - Quarterly/Monthly Advisory team meetings
 - Assign advisors to weekly chapter/exec/pledge meetings
- Connect with District Chief (DC) to discuss status/goals of the chapter

Financial Advisor

- Spring Dues out
- Plan a financial responsibility presentation/workshop with treasurer
- Approve Billhighway spending
- Work with treasurer to ensure officers are following their budgets

Risk Management

- Review risk management policy and incident reporting procedure (with Risk Manager and Chapter President)
 - Syllabus week
 - Beginning of semester parties

Recruitment

Spring Recruitment

Education

□ Discuss New Pledge Educator's ideas for the program

- Meet with Advisor
- Set Semester calendar
 - Recruitment calendar
 - Pledge Education & Initiation
 - o 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 <u>Education</u> / Workshops
 - o Establish and communicate **Recruitment structure/logistics**
- □ Register for Keystone (Deadline: Jan 20)
- ☐ General Fraternity Bills/Fees due on Jan 31
- □ Report new officers on MyBeta
- Pledge Induction
- Pledge Meetings



February Advisory Team Undergrads Attend Keystone Regional Meet with Advisor **Leadership Conference** □ Attend Keystone Regional Leadership □ Promote giving to the Sons of the Conference **Dragon Club** ☐ Give to the Sons of the Dragon Club (By April 1) Meet with LC ☐ Report Fall Grades on MyBeta (Due March 1) □ Attend pledge class meeting to ☐ General Fraternity Awards due April 15 discuss advisor roles and meet ☐ Assess Spring Recruitment and discuss potential pledges improvements ☐ Individuals can apply for Merit Scholarships (Due □ Maintain weekly communication with respective officers April 15) o Discuss progress on Meet with LC officer transitions □ Risk Management □ Attend chapter meeting(s) as o Formals assigned Socials/mixers **Chapter Counselor** Date Parties Plan Monthly/Quarterly advisor Pledge meetings meetings **Financial Advisor** □ Work with treasurer to establish payment plans ■ Host financial responsibility presentation/workshop □ Approve Billhighway spending □ Work with treasurer to ensure officers are following their budgets Risk Management □ Review risk management policy and incident reporting procedure (with Risk Manager and Chapter President) Formals Socials/mixers **Date Parties** Recruitment **Assess Spring Recruitment and** discuss potential improvements **Education** □ Discuss New Pledge Educator's



ideas for the program

Work with Pledge Educator on

weekly lesson plans

March Advisory Team Promote summer leadership development programs (All deadlines: April 15) Wooden Institute UIFI General Convention / Leadership College Promote giving to the Sons of the Dragon Club Meet with LC Attend pledge class meeting to discuss advisor roles and meet

Chapter Counselor

pledges

assigned

Plan Monthly/Quarterly advisor meetings

□ Maintain weekly communication

with respective officers

□ Attend chapter meeting(s) as

Financial Advisor

- □ Work with treasurer to collect on payment plans
- ☐ Review budget with treasurer and discuss potential changes
- □ Approve Billhighway spending
- Work with treasurer to ensure officers are following their budgets

Risk Management

- Review risk management <u>policy</u>
 and incident reporting <u>procedure</u>
 (with Risk Manager and Chapter
 President) in preparation for:
 - o Formals
 - o Greek Week
 - Spring Break
 - Socials/mixers/Date Party

Recruitment

Assess Spring Recruitment and discuss potential improvements

Education

■ Work with Pledge Educator on weekly lesson plans

Undergrads

- Mid-terms
- □ Register for summer leadership development programs (All deadlines: April 15)
 - Wooden Institute
 - o UIFI
 - o General Convention / Leadership College
- ☐ Give to the Sons of the Dragon Club (By April 1)
- □ Apply for Men of Principle Grant (Due April 15)
- Chapter should review budget and discuss potential changes
- ☐ General Fraternity <u>Awards</u> (Due April 15)
- □ Individuals can apply for Merit Scholarships (Due April 15)
- □ Risk Management
 - o Formals
 - Greek Week
 - Spring Break
 - Socials/mixers
 - Date Parties
- Meet with LC
- Pledge meetings



April Advisory Team Undergrads Promote summer leadership Plan for Initiation development programs (All Register for summer leadership development deadlines: April 15) programs (All deadlines: April 15) Wooden Institute Wooden Institute UIFI UIFI 0 0 General Convention / General Convention / Leadership College ☐ Give to the Sons of the Dragon Club (By April 1) Leadership College □ Promote giving to the <u>Sons of the</u> ☐ Apply for Men of Principle Grant (Due April 15) **Dragon Club** Chapter should review budget and discuss Meet with LC potential changes □ Attend pledge class meeting to ☐ General Fraternity <u>Awards</u> (Due April 15) discuss advisor roles and meet ☐ Individuals can apply for Merit Scholarships (Due pledges April 15) □ Maintain weekly communication Promote Men of Principle Scholarship with respective officers □ Risk Management Attend chapter meeting(s) as Formals assigned o Greek Week **Chapter Counselor** Spring Break Socials/mixers □ Plan Monthly/Quarterly advisor Date Parties meetings Prepare for Summer Recruitment **Financial Advisor** Set calendar of events □ Work with treasurer to collect on Recruitment Education / Workshops payment plans Establish and communicate Recruitment □ Review budget with treasurer and structure/logistics discuss potential changes Meet with LC □ Approve Billhighway spending Pledge meetings Work with treasurer to ensure officers are following their budgets **Risk Management** 0 Review risk management policy and incident reporting procedure (with Risk Manager and Chapter President) in preparation for: o Formals Greek Week **Spring Break** Socials/mixers **Date Parties** 0 Plan Summer Recruitment



May **Advisory Team Undergrads** ■ Assess Spring semester progress and goals Final Exams Do Advisory team and self-evaluation Graduation □ Notify Chapter Counselor by June 1 of your Senior Send-off intentions to stay with/leave the team Plan for Initiation ☐ Maintain weekly communication with □ Promote Men of Principle Scholarship respective officers Chapter should review budget and □ Attend chapter meeting(s) as assigned decide on changes (FY starts July 1) **Chapter Counselor** Register for summer leadership development programs Plan Summer meetings General Convention / **Financial Advisor Leadership College (Late** □ Work with treasurer to make sure all registration costs more) members are paid in full Review budget and decide on changes ☐ Review budget with treasurer and discuss (FY starts July 1) potential changes □ Approve Billhighway spending Prepare for Summer Recruitment □ Work with treasurer to ensure officers are Set calendar of events following their budgets Recruitment <u>Education</u> / **Risk Management** Workshops Review risk management policy and incident o Establish and communicate **Recruitment structure/logistics** reporting procedure (with Risk Manager and Pledge meetings **Chapter President)** End of year/graduation parties Recruitment Prepare for Summer Recruitment Set calendar of events Recruitment Education / Workshops Establish and communicate Recruitment structure/logistics

Education

Initiation

Work with Pledge Educator to plan for



June/July/August							
Adviso	ry Team	Under	grads				
	All Fees and Assessments must be paid		Summer Recruitment				
	by July 31.		Chapter should have a zero balance with the				
	Attend General Convention		General Fraternity by July 31.				
	Reach out to LC with any		Attend leadership development programs:				
	questions/concerns		o <u>Wooden Institute</u>				
Chapte	er Counselor		o <u>UIFI</u>				
	Attend Chapter Counselor meetings		 General Convention / Leadership 				
	scheduled by Greek Advisor (if		<u>College</u>				
	applicable)						
Financ	ial 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 M	anagement						
	(If chapter is housed and has occupants						
	during summer) Review risk						
	management policy and incident						
	reporting <u>procedure</u> with live-in Risk						
	Manager						
Recruitment							
	Summer Recruitment						
Educat	ion						

