

Phi Delta Theta Fraternity

Position Description

POSITION: Chapter Advisory Board Chairman

REPORTS TO: Province President

WORKS WITH: Chapter President, Vice President, Executive Committee, Greek Official

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 new development. He works with the chapter president and executive committee to oversee chapter operations and to create chapter programming. The Chairman also works with the University to maintain relations between the chapter, the General Fraternity, and the Greek Official/Dean of Students.

RESPONSIBILITY TO POSITION:

- Schedules and presides over monthly meetings with the Chapter Advisory Board.
- Attends one chapter meeting a month.
- Recruits and appoint other members to the CAB.
- Works with the chapter's president and other officers at the weekly executive meetings to implement the *Chapter Operations Assessment*.
- Meets with the campus Greek Official once per semester to monitor the progress of the chapter and to discuss campus issues.
- Works with the chapter's community service and philanthropy chairman to build a calendar of events.
- Works with the chapter's vice president to ensure the prompt submission of all reports to the General Headquarters.
- Works with the chapter's awards chairman in the preparation of the appropriate awards reports, both for the campus and the General Fraternity.
- Conducts a goal setting retreat for the chapter at the beginning of each semester. The creation of goals, objectives, and that semester's calendar should be conducted.
- Reports periodically to the Province President on the progress of the chapter.
- Works with the executive committee to establish chapter goals for the academic year.

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Position Description

POSITION: Financial Adviser

REPORTS TO: Chapter Advisory Board Chairman

WORKS WITH: Chapter Treasurer & Assistant Treasurer

BASIC FUNCTION:

The Financial Adviser focuses upon advising the treasurer in the development and maintenance of a sound financial base for the chapter. Responsibilities for this position are listed below. Additional resources can be found in the Treasurer's Manual.

RESPONSIBILITY TO POSITION:

- Attends the monthly Chapter Advisory Board meetings
- Attends one chapter meeting a month.
- Meets with the treasurer monthly to evaluate the current state of the chapter's Treasury.
- Assists in the development of membership and/or housing contracts, promissory notes, and a budget.
- Serves as an ex-officio member of the financial, budget, delinquencies, and any other committees that have to do with chapter finances.
- Approves the chapter's budget, contracts, financial bylaws, and any payment plans or promissory notes.
- Helps to educate the members on the financial obligations of Phi Delta Theta and their importance to the chapter.
- Makes sure that the treasurer is keeping up on all items of paperwork that are necessary for General Headquarters points. These include, but are not limited to: GHQ bills, monthly treasurer reports, the annual audit, and the yearly budget. The adviser must make sure that these reports are being filled out appropriately.
- Ensures that all tax forms are turned in on time and are accurate to the best of the chapter's knowledge.
- Develops ways to help promote fundraising ideas amongst the chapter's members.
- Promotes smooth transition between the incoming and outgoing treasurer.
- Develops a good rapport with the chapter so members will respect and follow suggestions.

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Position Description

POSITION: Recruitment Adviser

REPORTS TO: Chapter Advisory Board Chairman

WORKS WITH: Recruitment Chairman & Recruitment Committee

BASIC FUNCTION:

The Recruitment Adviser supervises and advises the activities of the chapter's membership recruitment program. He works with the chapter's recruitment chairman and recruitment committee to coordinate the recruitment program of the chapter. Also, he serves as a liaison between the local alumni and the chapter to organize events and support. Additional resources can be found in the Recruitment Chairman's Manual.

RESPONSIBILITY TO POSITION:

- Attends the monthly meetings of the Chapter Advisory Board.
- Attend at least one chapter meeting per month.
- Supervises the activities of the recruitment chairman, and meets with him at least once a month during the academic year, and several times during the summer break.
- Assists in planning and the organization of the chapter's recruitment program for both the summer and academic year.
- Helps facilitate pre/post recruitment workshops for the chapter.
- Conducts these workshops with the support from local alumni and the General Headquarters.
- Helps the recruitment chairman and the chapter set realistic recruitment goals.
- Coordinates with the local alumni club, or area alumni, to receive recruitment recommendations and to participate in chapter's recruitment program.
- Approves and coordinates location for recruitment events
- Ensures that the recruitment program is conducted in accordance with *The Risk Management Policies of the Phi Delta Theta Fraternity*.

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Position Description

POSITION: Risk Management Adviser

REPORTS TO: Chapter Advisory Board Chairman

WORKS WITH: Chapter Social Chairman, Risk Management Chairmen, Phikeia Educator

BASIC FUNCTION:

The Risk Management Adviser supervises and advises the activities of the chapter's risk management and social chairmen. He works with the chapter to ensure their social program follows the Phi Delta Theta Risk Management Policies and the local college or university's social guidelines. In addition, he works directly with the Phikeia Educator to ensure the new Phikeia class is educated on the principles of risk management and the above mentioned policies. Additional resources can be found in Phi Delta Theta's Risk Management Packet and the *Phikeia Program*.

RESPONSIBILITY TO POSITION:

- Attends the monthly Chapter Advisory Board meeting.
- Attends at least one chapter meeting per month.
- Supervises the activities of the chapter's risk manager, and meets with him once a month during the academic year and at least once during the summer break and Christmas break to help oversee the planning of the social calendar for the upcoming semester.
- Helps facilitate and plans risk management workshops for the chapter and Phikeia class which includes, but are not limited to, the following topics:
 - * Basic risk management * Phi Delta Theta's Risk Management Policies * chapter liability insurance * hazing * fire prevention planning * crisis management * house maintenance and kitchen safety * alcohol awareness * chapter event planning *
- Knows, understands, and, if necessary, enforces Phi Delta Theta's Risk Management Policies, the local university or college's social guidelines, and Phi Delta Theta's Crisis Management plan.
- Helps maintain a filing system consisting of file copies of Event Planning Forms.
- Has a thorough understanding of the *Event Planning Program* offered by General Headquarters and helps supervise the event planning process for each chapter event.
- Performs along with the risk manager and house manager (if applicable) a fire and life safety inspection of the chapter living facility each semester.
- Meets with the chapter's house manager (if applicable) at least once per term/semester to ensure a comprehensive fire safety program is in place.

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Position Description

POSITION: Phikeia Education Adviser

REPORTS TO: Chapter Advisory Board Chairman

WORKS WITH: Chapter Phikeia Educator & Pallas Committee

BASIC FUNCTION:

The Phikeia Education Adviser supervises, and advises the activities of the chapter's Phikeia education program. He works with the Phikeia Educator and the Pallas committee to oversee the proper education of the Phikeias. Also, the Phikeia Education Adviser creates and develops programming with the chapter members for the pledge program. Additional resources can be found in the *Phikeia Program*.

RESPONSIBILITY TO POSITION:

- Attends the monthly meetings of the Chapter Advisory Board.
- Attends at least one chapter meeting per month.
- Meets with the Phikeia Educator to help plan and organize a positive and constructive pledge program for the chapter.
- Serves as an ex-officio member of the pledge education committee and Pallas Committee.
- Attends at least two class meetings a month during the pledge period.
- Know and understand *The Phikeia Program*. Encourage the use of the program with the chapter.
- Discusses and establishes the goals and objectives of the Phikeia Educator and pledge program.
- Reminds the chapter and Phikeia Educator of the goals throughout the pledge program, when necessary.
- Sees that all pledge and initiation documents and fees are paid to the General Headquarters on time and in full.
- Ensures that all recruitment and pledging programs are conducted in accordance with *The Risk Management Policies of the Phi Delta Theta Fraternity*.
- Administers the test that all members will have to take prior to initiation.

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Position Description

POSITION: Alumni Relations Adviser

REPORTS TO: Chapter Advisory Board

WORKS WITH: Chapter Alumni Secretary, Alumni Club President

BASIC FUNCTION:

The responsibility of the Alumni Relations Adviser is to oversee and help develop the chapter's alumni relations program. He will also serve as the liaison between the chapter and the local alumni club and coordinate efforts to enhance the relationship between the chapter and their respective alumni club. Additional resources can be found in the Alumni Secretary's Manual.

RESPONSIBILITY TO POSITION:

- Attends monthly Chapter Advisory Board meetings.
- Attends one chapter meeting a month.
- Attends all alumni club meetings and any other regularly scheduled events.
- Helps the chapter initiate the following events: Founders Day, Homecoming, Alumni Newsletter, and a joint schedule of events.
- Informs the chapter of any upcoming events sponsored by the alumni club
- Assists in the planning for Phi Delt and campus anniversaries
- Informs the undergraduate chapter of alumni achievements
- Informs the alumni base of chapter achievements
- Assists in the organization of co-sponsored activities between the chapter and the alumni
- Assists the chapter in developing strong alumni relations
- Meets with the chapter's alumni secretary at the beginning of each semester to assess and improve the chapter's alumni relations program.
- Works with the alumni to conduct and execute programming for the following events: social, alumni, membership recruitment, career planning, and internships.

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Position Description

POSITION: Academic Adviser

REPORTS TO: Chapter Advisory Board Chairman

WORKS WITH: Scholarship Chairman

BASIC FUNCTION:

The responsibility of the Academic Adviser is to oversee the chapter and its operations in fulfilling their quest to live up to, and exceed in the second principle of the Fraternity; Sound Learning. He will assist the chapter in setting and achieving goals and will help set academic standards for individuals as well as the chapter.

RESPONSIBILITY TO POSITION:

- Attends the monthly meetings of the Chapter Advisory Board.
- Attends at least one chapter meeting per month.
- Assists the chapter in setting and achieving realistic goals pertaining to academics.
- Approves the chapter's scholarship program, the scholarship section of the bylaws for members below the chapter's requirements for good standing.
- Knows campus procedure for the release of chapter members' grades.
- Reviews the Scholarship Chairman's manual with each scholarship chairman upon election to his office.
- Enforces Fraternity, chapter, campus and IFC scholarship requirements.
- Encourages the scholarship chairman to use his committee effectively and to use creative and innovative ideas in scholarship programming.
- Meets with the scholarship chairman prior to each semester to review the current scholarship program and look for ways to update and improve the program.
- Works with area alumni to assist in securing local prominent Phi Deltas to discuss the business world and the key to success.
- Works with scholarship chairman to see that an awards and incentives program is implemented and utilized on a semester basis.
- Introduces himself and meets with the Phikeias during a Phikeia class meeting to discuss the scholarship requirements of the chapter, campus and IFC.
- Encourages the chapter to maintain an environment conducive to good study habits.

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Position Description

POSITION: Faculty Adviser (On Campus)

REPORTS TO: Chapter Advisory Board Chairman

WORKS WITH: Chapter President & Public Relations Chairman

BASIC FUNCTION:

The responsibility of the Faculty Adviser is to oversee the chapter and its operations in utilizing the campus and administrative resources to the best of their ability. This person will serve as a liaison between the chapter and the institution and coordinate efforts to educate the members and enhance the relationship between the institution and chapter on a continual basis.

RESPONSIBILITY TO POSITION

- Attends the monthly meetings of the Chapter Advisory Board.
- Attends at least one chapter meeting per month.
- Meets with public relations officer and committee prior to each semester to review the current public relations program and look for ways to update and improve the program.
- Assists the chapter in setting up an educational public relations program.
- Assists in the organization of several public relation events for Greeks, non- Greeks and the campus.
- Ensures a campus representative conducts a workshop covering the importance of Greek relations.
- Encourages that each brother be involved in at least one other campus organization.
- Assists in the organization of a workshop for upperclassmen concerning graduate schools and other secondary education issues such as taking the GRE, LSAT, MCAT etc.
- Helps uphold Fraternity, chapter, campus, and IFC regulations.
- Encourages the public relations chairman to use his committee effectively and to use creative and innovative ideas in public relations programming.
- Works with area alumni to assist in securing local prominent Phi Delta Theta alumni to discuss public relations and the importance of networking.
- Ensures that the chapter is aware of, and applies for the General Fraternity awards.
- Introduces himself and meets with the Phikeias during a Phikeia class meeting to discuss the importance of living up to the expectations of the chapter, campus and IFC.
- Encourages the chapter to maintain an environment conducive to a high standard of morality.