



Chapter Advisor/Chapter Checklist

This checklist is designed to help Chapter Advisors and Chapter Officers determine a clear role for Chapter Advisors in matters pertaining to the Chapter.

The President of each Chapter, in consultation with the Exec Board as appropriate, and the Chapter Advisor should respond to the following items and meet to compare and discuss answers.

For each statement, respond according to the following scale:

1	2	3	4	5
Essential to the Advisor role	Helpful for the Advisor to do	Not required for the Advisor to do	Would prefer the Advisor not do	Absolutely not the Advisor's role

- _____ 1. Attend Executive Board meetings.
- _____ 2. Attend Chapter Meetings.
- _____ 3. Attend Chapter activities and events.
- _____ 4. Interject during discussion with relevant information or guidance for decision-making.
- _____ 5. Share opinions during Chapter Meetings.
- _____ 6. Sign forms as required by the sheltering institution or National Office.
- _____ 7. Attend Advisor trainings offered by the sheltering institution or National Office.
- _____ 8. Take an active role in strategic planning and goal setting for the group.
- _____ 9. Offer ideas for discussion to help the Chapter make progress toward goals.
- _____ 10. Approve Chapter expenditures in cooperation with the Treasurer.
- _____ 11. Review the Chapter Budget and other financial records kept by the Treasurer at the end of the term.
- _____ 12. Receive a copy of all official correspondence.
- _____ 13. Keep official files and facilitate transition between Officers.
- _____ 14. Advise the group regarding governing documents, including improvements to bylaws and operating policy.
- _____ 15. Ensure the proper planning and execution of events that align with Fraternity ideals.
- _____ 16. Mediate interpersonal conflicts that arise between Chapter Members.
- _____ 17. Plan and facilitate workshops or other trainings for the Chapter.
- _____ 18. Meet with Chapter Officers at the beginning of the year to discuss expectations for the Advisor role.
- _____ 19. Represent the Chapter in any conflicts with the sheltering institution and its staff.
- _____ 20. Be familiar with institution facilities, services, procedures and policy and provide clarification when relevant.