

# CHAPTER ADVISORY BOARD GUIDE



**LAMBDA CHI**  
FRATERNITY

# Chapter Advisory Board Guide



## Message from the Office of Administration

Welcome to your Zeta's Advisory Board! Your appointment reflects the deep trust your Chapter, the Grand High Zeta, and the Office of Administration have placed in you. As an Advisor, you'll shape the next generation of leaders through your wisdom, example, and dedicated engagement. This role carries significant responsibility. Effective Advisors demonstrate excellence through active participation in meetings and events, uphold the highest standards of conduct, and provide thoughtful guidance to chapter leadership. Your commitment of time and expertise will strengthen our Brotherhood and create lasting impact. We're honored to have you serve.

A handwritten signature in black ink, appearing to read 'Troy Medley'.

Troy Medley  
Chief Executive Officer



# Introduction

This guide is designed to clarify expectations and equip you with tools and resources for the growth and improvement of your Advisory Board, and the Chapter you serve.

## The role of the Advisory Board

Advisory Boards are critical to the success and sustainability of our Chapters. A well-established Advisory Board comprises a High Pi and a wide array of Advisors, including, but not limited to Ritual, finance, recruiting, learning and development, philanthropy, and governance. By building a strong, reliable group of Advisors, you will be able to promote local successes, address challenges, develop solutions, and raise awareness across a diverse group of potential supporters. More importantly, you can alleviate the pressure to accomplish many of the activities required to make our Chapters a major success.

## What is an effective Advisor?

Advising, involves providing information and guidance to Chapter Members and Officers according to the local context. Not restricted to a specific role, Advisory Board Members, along with the High Pi, should seek to use their varied strengths to support the Chapter. Acting in a consultant-like capacity, you are tasked with mentoring Officers to succeed in their role and understand the consequences of their actions.

## Living the Code of Conduct

To be effective, Advisors need to be able to build trust. You do this by:

- Showing compassion when Brothers are hurting
- Challenging Brothers to make the most of their educational experience
- Intervening if a Brother puts himself or others at risk
- Helping Brothers live by the teachings of our Ritual
- Allowing Brothers to live their Chapter experience and not re-live my Chapter experience
- Guiding Brothers to decisions grounded in our Seven Core Values
- Playing the role of neutral mediator between the Chapter and the Office of Administration

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## Glossary of Terms

<b>AB</b>	Advisory Board
<b>CP</b>	Campus Professional
<b>HATS</b>	High Alpha Training Specialist
<b>GPA</b>	Grade Point Average
<b>H&amp;WM</b>	Health & Wellness Manager
<b>LO</b>	Learning Outcomes
<b>MA</b>	Male Average
<b>MYLCA</b>	myLambdaChi Portal
<b>PS</b>	Partnership Specialist
<b>SLC</b>	Stead Leadership College - Online Programming
<b>TM</b>	Training Manager
<b>VS</b>	Volunteer Support

# Chapter Operations

Each Zeta is unique in its traditions and practices. The **Chapter Success Metrics** outlined below show the best practices of our highest performing Chapters across Lambda Chi Alpha. Different from Operating Standards of the past, these metrics serve as the basis for measuring Chapter performance.

## Chapter Success Metrics

Objective	Goal	Status
Chapter Membership	> Campus Average	
Chapter GPA	> 2.75 or MA	
Community Service	2 Philanthropic Events	
Incidents	Good Standing	
Financial Status	Current	
Chapter Advisors	Certified High Pi & AB	
Ideal Man & SLC	> 80% Participation	
Stead Leadership College	Alpha, Tau, Delta, Kappa, Iota	
Host Initiation Ritual	Twice in Academic Year	

**\*Status: Does Not Meet (DNM) | Meet**

## Resources Available

To support the attainment of these Chapter Success Metrics, the following resources have been created and are outlined below to assist in your advising efforts.

Please reach out to the Volunteer Support team for additional resources:

[alumni@lambdachi.org](mailto:alumni@lambdachi.org)

Operational Area	Resource	Contact
Recruitment	<a href="#">High Delta Hub</a>   SLC   Facilitation	HATS
Academics	<a href="#">High Sigma Hub</a>   Campus Resources	HATS   CP
Community Service	<a href="#">High Theta Hub</a>   Philanthropy Toolkit	HATS   PS
Harm Reduction	<a href="#">High Iota Hub</a>	HATS   H&WM
Finance	<a href="#">High Tau Hub</a>   SLC	HATS
Alumni Engagement	<a href="#">High Rho Hub</a>	VS
Chapter Programming	<a href="#">High Kappa &amp; Beta Hub</a>   SLC	LO
Ritual	<a href="#">High Phi Hub</a>   SLC	HATS   TM

**\*Program support/training can be delivered by staff or volunteer**

# Advisory Board Mission Critical Tasks

To ensure a Chapter remains in good standing, the following tables outline the responsibilities and key tasks for the High Pi, Delta, Tau, and Kappa, followed by additional tasks for all Officers.

## *High Pi*

<b>Officer</b>	<b>Task</b>	<b>Frequency</b>
High Pi	Lead Monthly Advisory Board Meeting	Monthly
High Pi	Attend Executive Committee Meetings	Monthly
High Pi	Check-In with Campus Professional & CSS	Quarterly
High Pi	Attend High Zeta & Chapter Meetings	As Needed
High Alpha	Develop a Chapter Plan	Annually

## *High Delta Advisor*

<b>Officer</b>	<b>Task</b>	<b>Frequency</b>
AB Member	Ensure a Certified Advisor Attends Chapter Meeting	As Needed
AB Member	Check-In with Chapter Officer	Monthly
AB Member	Attend Advisory Board Meeting	Monthly
High Delta	Plan and execute year-round recruitment activities*	Ongoing
High Delta	Coach effective recruitment techniques to Chapter*	Ongoing

### ***High Tau Advisor***

<b>Officer</b>	<b>Task</b>	<b>Frequency</b>
AB Member	Ensure a Certified Advisor attends Chapter Meeting	As Needed
AB Member	Check-In Monthly with Chapter Officer	Monthly
AB Member	Attend Monthly Advisory Board Meeting	Monthly
High Tau	Complete Chapter budget	Prior to term
High Tau	Bill Members Pay OoA invoice	2/15 & 9/15* 3/15 & 10/15*

### ***High Kappa Advisor***

<b>Officer</b>	<b>Task</b>	<b>Frequency</b>
AB Member	Ensure a Certified Advisor attends Chapter Meeting	As Needed
AB Member	Check-In Monthly with Chapter Officer	Monthly
AB Member	Attend Monthly Advisory Board Meeting	Monthly
High Kappa	Facilitate Ideal Man program through LC Academy*	Ongoing
High Kappa	Assist High Phi in making fraternity education safe/no hazing*	Ongoing



### ***Additional Officer Operations***

<b>Officer</b>	<b>Task</b>
High Beta	Record Members' involvement in campus organizations
High Beta	Plan two Brotherhood events per month
High Theta	Execute Social Responsibility plan to support a philanthropic cause*
High Theta	Host large-scale philanthropic fundraising event in the fall and spring*
High Gamma	Ensure all documents are stored in a safe and accessible place
High Gamma	Ensure Chapter roster is updated on a daily basis*
High Iota	Identify and train Event Monitors for all Chapter events
High Iota	Review and distribute the Chapter's Crisis Management Plan
High Rho	Create and implement engagement strategies to connect all members
High Rho	Organize professional and personal development programs
High Phi	Oversee the production of initiation ritual*
High Phi	Coordinate all ceremonies and experiences related to Ritual
High Sigma	Review Member academic standing with the Executive Committee
High Sigma	Distribute academic support resources to the Chapter*
High Epsilon	Plan and execute a social event calendar
High Epsilon	Maintain social relationships with other student organizations

**\*Denotes activity that directly ties to Minimum Success Factors**

# Advisory Board Position Descriptions

## High Pi

### Summary

The High Pi (Alumni Advisor) is responsible for the guidance of the Chapter by offering assistance on programs, organizational practices, and mentoring through Advisory Board Members. Their principal role is to support the Chapter through advising the Officers. Additional responsibilities include managing the Advisory Board, serving on the Executive Committee, encouraging participation in the [Ideal Man] and Stead [Leadership College] programs.

### Priority Tasks

1. Lead Monthly Advisory Board Meeting
  - a. The Advisory Board itself should meet at least monthly (either in person or virtually). At the meetings of the AB, discussion should center on how the alumni can help the chapter address some pressing problems, or how to help the Chapter meet its current goals.
2. Attend Executive Committee Meetings
  - a. The Executive Committee is comprised of seven Members — the High Alpha, High Tau, the High Pi, two Members-at-large elected by the Chapter, and one alternate. The High Beta is an ex-officio Member of the Executive Committee. It should meet before or following the Chapter business meeting. An agenda should be prepared by the High Alpha and followed at each meeting.
3. Check-In with Campus Professional
  - a. It is important to develop a relationship with the campus officials, specifically, the Director of Fraternity/Sorority Life. We encourage you to reach out to the Greek Life professional for an introduction and meet periodically.
4. Attend Chapter Meeting (as needed)
  - a. The Chapter meeting is the time to discuss business, upcoming events and programs. Depending upon the amount of business to be discussed, most Chapter meetings, regardless of the Chapter's size, should only last approximately one hour.

# High Delta Advisor

## Summary

The High Delta is responsible for leading the recruitment efforts of the Chapter and adopting a 365 recruitment model. Consequently, a Chapter's recruiting efforts must be based upon the entire Chapter participating and must be well-organized and consistent with the Chapter's education model. The High Delta and the Recruitment Committee should plan a comprehensive schedule of recruiting activities well in advance of the recruitment season.

## Priority Tasks

1. Ensure a Certified Advisor attends Chapter Meeting
  - a. The High Pi doesn't have to attend every Chapter meeting. A Certified Advisory Board Member can attend in the High Pi's stead.
2. Check-In with Chapter Officer
  - a. It's important to check-in with your assigned Chapter Officer at least once a month. Meetings can either be in-person or virtual.
3. Attend Advisory Board Meeting
  - a. Providing a meaningful update is crucial continuing progress toward the Chapter's goals. Update the Advisory Board on:
    - i. Established KPIs (Key Performance Metrics)
    - ii. Operation Successes
    - iii. Operational Challenges
4. Support the planning and execution of year-round recruitment activities
  - a. Proactive participation in both the formal and informal recruitment opportunities the campus environment provides.
  - b. Generation of leads and establishment of a recruitment pipeline where each lead can be accurately track through the stages of the recruitment process.
5. Coach effective recruitment techniques to Chapter
  - a. Identify and use Members strengths in recruitment conversations with potential new Members.
  - b. Identify and address Members weaknesses in recruitment conversations with potential new Members.

# High Tau Advisor

## Summary

The High Tau is responsible for preparing the Chapter's budget, managing the Chapter's financial accounts, billing Members, paying expenses, and filing Chapter taxes. The Chapter's budget is prepared by the High Tau with the assistance of the Executive Committee, then approved by the Chapter. The High Tau should have access to all Chapter financial accounts and keep accurate and timely records. The High Tau uses greekbill, unless exempt, to invoice and collect Member dues. The High Tau monitors cash flow to ensure accounts receivable and accounts payable are satisfied. The High Tau files IRS Form 990 annually (U.S. Chapters only).

## Priority Tasks

1. Ensure a Certified Advisor attends Chapter Meeting
  - a. The High Pi doesn't have to attend every Chapter meeting. A Certified Advisory Board Member can attend in the High Pi's stead.
2. Check-In with Chapter Officer
  - a. It's important to check-in with your assigned Chapter Officer at least once a month. Meetings can be either in-person or virtual.
3. Attend Advisory Board Meeting
  - a. Providing a meaningful update is crucial continuing progress toward the Chapter's goals. Update the Advisory Board on:
    - i. Established KPIs (Key Performance Metrics)
    - ii. Operation Successes
    - iii. Operational Challenges
4. Support the completion of the Chapter Budget
  - a. Calculate the anticipated expenses for the Chapter, including expenses from the General Fraternity, university, local operations, Housing Corp., etc.
  - b. Calculate the income needed from each Member (dues) to satisfy the Chapter's expenses.
  - c. The Office of Administration provides templates and resources to help prepare the Chapter's budget.
  - d. After budget approval, copies should be readily available to Chapter Members, Advisors, and Alumni of the Zeta.
5. Bill Members & pay General Fraternity invoice
  - a. All Chapters use greekbill, a billing software, to invoice Members' their dues.
    - i. Select Chapters have been approved as exempt by the Office of Administration.
  - b. The High Tau creates and assigns charges, monitors payments, and tracks deposits to the Chapter's bank account.
  - c. The High Tau uses funds in the Chapter's bank account to pay expenses from the General Fraternity, university, local operations, etc.

# High Kappa Advisor

## Summary

The High Kappa is responsible for the education of all Chapter Members, both Associated and Initiated. The Kappa Program is the backbone to any successful Chapter. When mapping out the program, encourage the High Kappa and the Brotherhood Education committee to use imagination and creativity. They should avoid basing the Brotherhood education program solely upon “tradition.” Rather, it should be based upon useful, constructive activities and definite goals.

## Priority Tasks

1. Ensure a Certified Advisor attends Chapter Meeting
  - a. The High Pi doesn't have to attend every Chapter meeting. A Certified Advisory Board Member can attend in the High Pi's stead.
2. Check-In with Chapter Officer
  - a. It's important to check-in with your assigned Chapter Officer at least once a month. Meetings can be either in-person or virtual.
3. Attend Advisory Board Meeting
  - a. Providing a meaningful update is crucial continuing progress toward the Chapter's goals. Update the Advisory Board on:
    - i. Established KPIs (Key Performance Metrics)
    - ii. Operation Successes
    - iii. Operational Challenges
4. Support the facilitation of Ideal Man programming through LC Academy
  - a. Ideal Man is built for all Members of the Chapter and is split into four learning journeys. The first, *Developing Myself*, focuses on Associate Member onboarding and should be where a High Kappa starts when implementing Ideal Man.
5. Work with High Phi to ensure fraternity education and Ritual are safe and include absolutely no hazing
  - a. Hazing is defined in Code 4-8 of the *Constitution and Statutory Code*. The Office of Administration can suggest ideas for Chapters looking to update their existing fraternity education and pre-Initiation activities.

# Additional Resources

## **Advisor Hub**

One-stop-shop for all advising resources developed by the Office of Administration

## **Neville Advisor's College**

In-person Advisor Training Conference for High Pis, Advisory, and Control Board members.

## **Affinity Groups**

Virtual Webinar designed to answer FAQs and provide collaboration on Chapter operations

## **Constitution and Statutory Code**

The 47th Edition of the ConStat are in place to provide a framework for our organization.

# Appendix

## Advisory Board Meeting Agenda

The purpose of the Advisory Board is to work together with the Chapter's Officers toward the goal of expanding the day-to-day operations and programs of the Chapter.

### Example Agenda:

1. Call to order - High Pi
2. Advisor report - each board member who directly advises an Officer
  - a. How is the Officer doing?
  - b. How is he progressing on his and his Chapter's goals?
  - c. Upcoming events or programs
3. State of the Chapter/Associate Chapter - High Alpha or High Pi
  - a. Current challenges or issues facing the Chapter
  - b. Successes
  - c. Long-term goals
4. Open discussion
5. Schedule next meeting time
6. Adjournment

### Example Advisor Officer Meeting Agenda

1. General check-in
  - a. How are you doing?
2. Officer priorities
  - a. What are you working on?
3. Challenges
  - a. What is the biggest challenge in your role?

## **Executive Committee Agenda**

The Executive Committee shall act for the Chapter in all matters not requiring the vote of the entire Membership and not otherwise provided for in the Laws of the Fraternity or the bylaws of the Chapter.

### **Example Agenda:**

1. Review/approval of previous week's minutes
2. Treasurer report (weekly)
  - a. Account balances (checking and savings)
  - b. Accounts receivable
  - c. Accounts payable
  - d. Budget updates
  - e. Financial suspension
3. Scholastic report (once a month)
4. Review of High Zeta Officer (one Officer per week)
5. Review and recognition of Membership
6. Old business
7. New business
8. Adjournment (set a time and place for the next meeting)



## Chapter Meeting Agenda

*Formal Meetings:* The Chapter should be having a formal meeting once a month. A formal meeting means that the Ceremony for Conducting Business Meetings is being performed and that Members are coming dressed in badge attire (coat, tie, and Brother badge/Associate Member pin).

### **Example Agenda:**

1. Call to order
2. Creed of Lambda Chi Alpha
3. Roll call
4. Approval of the last meeting's minutes
5. Guests
6. Officer reports
7. Committee reports
8. Old business
9. New business
10. Open discussion
11. Adjournment