

TOP FIVE TIPS FOR

advisers

ADVISORY TEAM CHAIR (ATC)

Learning the basics of the officer you support?

Check out a few important resources including the Collegiate Chapter Officers Manual (CCOM), officer quick guides and Fraternity Standards for Collegiate Chapters. The CCOM and related quick guides review specific responsibilities for each officer.

- 1. So, you are an adviser... now what?** A great place to start is the [advisory team handbook](#). This resource is meant to be an overarching view of adviser roles and also includes a place at the end that lists out resources specific to each adviser position.
- 2. You put the 'team' in advisory team!** As ATC, you are the leader of the entire advisory team for the chapter. It can be helpful to set regular check-ins with your advisory team to see if advisers are enjoying their roles, identify other areas they may be interested in serving and ask for feedback on where they may need additional support.
- 3. Set your communication preferences.** How will you communicate with the chapter officers? How will you communicate with the other advisory team members? Setting these expectations from the beginning is helpful. Maybe you prefer email over text unless something is urgent, or not to expect a response after 9 p.m. Setting boundaries is helpful for yourself and for the volunteers and collegians you work with to know what to expect from you.
- 4. Sharing is caring.** Providing feedback to other volunteers is an important part of serving as the advisory team chairman. People want to know when they are doing a good job. If they don't know, they may not continue doing the good job they are doing! Similarly, if people get off track, they want to know early on rather than too far down the road. Be sure to incorporate positive and constructive feedback with the advisers you work with throughout the term.
- 5. When an officer needs some more guidance.** Each officer position has an associated quick guide, which is an overview of the position's purpose, tasks and relevant resources. When a CMT or JCMT officer is unsure how to dive into their position, these guides are a great starting point. Encourage officers and the advisers who support them to review the document relevant to them by searching "quick guide" in the [Delta Gamma library](#). Additionally, each officer is responsible for some of the Fraternity Standards for Collegiate Chapters, with the chapter president ensuring officers are aware of this and leading conversations with CMT about meeting the Standards. If officers are unsure of what the Standards are and how they relate to their roles, please direct them to the Fraternity Standards for Collegiate Chapters by searching in the library.

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HONOR BOARD ADVISER (HBA)

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Now let's talk about Fraternity Standards. What are they and how do they apply to the officer(s) you support? Performance related to these standards will determine chapter status, support and awards. All officers should be familiar with the Fraternity Standards, what they're responsible for and how they can be used for goal-setting.

The categories that include Standards related to the vp: social standards are: Honor Board, Chapter Culture and Health, Well-Being and Member Safety.

- 1. Honor Board goes digital.** All Honor Board paperwork and processes occur in [Anchorbase](#). The vp: social standards uses the Anchorbase platform to manage all reporting and documentation. As an adviser, you should familiarize yourself with the Anchorbase platform and ensure that the chapter understands how to submit a SOR using this process. The [Honor Board in Anchorbase](#) guide is a great tool to use.
- 2. Excused Status, EAS, transfer, oh my!** Chapter members may approach Honor Board with questions on available member statuses based on their situation. The [Member Status Guide for Chapter Members](#) includes a flow chart of information to help a member determine which status option they want to pursue.
- 3. Let's talk about morale.** Discussing chapter trends or morale is a component of Honor Board meetings that can get put on the back burner. Encourage officers to discuss these topics regularly and remind them that a component of Honor Board's purpose is to help recommend programming based on the trends they see. The [Honor Board Supportive Programming resource](#) helps to connect tangible ideas for what this looks like.
- 4. When the conversations get tough.** Honor Board will deal with a wide variety of topics and discussions. When conversations get tricky, officers often turn to the adviser to help navigate those discussions. The [Honor Board Conversation Guide](#) is a great resource to refer to for how to handle these situations. As an adviser, you could even encourage Honor Board to use this guide to do mock conversation practice to help build confidence in navigating difficult conversations.
- 5. Excused Status and Dues & Fees.** Some types of Excused Status include accommodations to a member's chapter dues and fees. Ensure that the vp: finance is collaborating with Honor Board to understand how granting Excused Status impacts the chapter budget. The [Excused Status Financial Resource](#) reviews what set of fees each type of Excused Status pays.

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CHAPTER FINANCE ADVISER (CFA)

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The categories that include Standards related to the vp: finance are: Finance.

- 1. How's the chapter budget doing, anyway?** The chapter budget is something that should be re-visited regularly. It's a good idea for the vp: finance to review their budget monthly to get a clear picture of how the chapter is doing financially. Some things to ask the vp: finance to review can be updates needed to the member survey, adjustments to the number of new members on the member counts tab, and updates with actual expenses paid on the expense tab.
- 2. It's all 'greekbill' to me.** As an adviser, you should have an admin account on your chapter's greekbill account. The Delta Gamma greekbill support site has intro videos to help you feel confident in using the platform.
- 3. When you're vp: finance isn't sure where to code something...** Have you looked at the Chart of Accounts? The chart of accounts can be found at the end of the Collegiate Finance Handbook and reviews where each type of expense can be coded in greekbill. Coding things to the correct account is helpful to ensure we budget appropriately.
- 4. For a quick check to make sure we're on track.** Check the Delinquent Report Spreadsheet (DRS)! The DRS is updated weekly and can be found in the DG Library. It is also included in the monthly collegiate chapter newsletters. The DRS tracks to ensure chapters are submitting monthly bank statements, monthly greekbill reports, and any relevant W9 forms. Chapters may be penalized if they are on the DRS for multiple months.
- 5. Who's who in finance?** There are lots of great support resources on the finance team. Each chapter has a Collegiate Finance Consultant (CFC) at Executive Offices. The CFC is the go-to resource for chapter bank account concerns, monthly reconciliation and accumulated surplus. The Regional Finance Specialist (RFS) is the volunteer who supports all finance efforts within your region. The RFS is a go-to resource for questions about charge generation approval on greekbill and questions related to general finance operations. The Collegiate Budgeting Team consists of EO staff and volunteer support who drive the collegiate budgeting process. The Collegiate Budgeting Team will provide a draft version of the chapter budget in the spring.

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PROGRAMMING ADVISER

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The categories that include Standards related to the vp: programming are: Chapter Culture, Health, Well-Being and Member Safety and Community.

- 1. Programming that makes a difference.** No single chapter is alike. It's important to consider how we can choose relevant programming based on the chapter's needs or goals. Work with your vp: programming to reflect on programming events that will increase participation, increase engagement and increase the value of membership. Not sure what this looks like in your chapter? Ask the members! Using surveys is a great way to keep a pulse of what members are looking to get out of their experience.
- 2. There's a DG Dialogue for that.** DG Dialogue programs are a great way to plug in conversations and engagement on issues or topics that are important to a chapter. When discussing chapter goals and programming, review the [DG Dialogue Program Guide](#) with the chapter officers you work with to find programs that may resonate well with the chapter.
- 3. Let's make a calendar plan.** Calendar planning is an important aspect of the vp: programming's job, but it is a team effort across CMT. The [Calendar Planning Guide](#) outlines all steps that each officer should take to give careful consideration for an effective calendar. If you get questions about requirements or aspects of the calendar, chances are the answer is in this guide.
- 4. Plans change, that's ok!** Does an officer reach out about needing to change something on the calendar? If an Anchored event needs to be changed, the chapter should vote to approve this change. Once the chapter approves, the date should be updated on Anchorbase and any additional calendars the chapter uses. Notify the RCS about this change.
- 5. Program smart, not more.** Sometimes officers have great ideas for events and programming but don't have great attendance if members are frustrated with feeling like the calendar is too full. Encourage officers to use [multi-purpose programming](#) strategies to maximize the number of programming requirements that can be achieved while ensuring that we aren't over-programming chapter members.

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MEMBER EDUCATION ADVISER

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The categories that include Standards related to the vp: member education are: Chapter Culture, Health, Well-Being and Member Safety and Community.

- 1. Teamwork makes the dream work.** The member education area is unique because it often has several director positions that support the vp: member education. As an adviser, encourage the member education team to set up meetings and check-ins to help discuss ways that their areas support education in the chapter as a whole.
- 2. Our Ritual sets us apart.** We know rituals should feel special, but sometimes we get stuck in a rut! Have a conversation with officers about the strengths and weaknesses of the ritual program. Refer to ideas in the [Rituals Handbook](#) for ways that both formal and informal rituals can be incorporated in chapter programming. Do chapter members know the meanings of our rituals? The [Revisiting Our Rituals](#) guide in the Library also includes Fraternity resources when questions come up about how to do these ceremonies correctly.
- 3. Supporting educational interests.** The director of scholarship is tasked with leading the chapter's scholarship plan, both to celebrate members' academic achievements and to support those who need additional support. Chapter officers may come to you looking for ideas and the [Scholarship Handbook](#) is a great place to start. This resource includes sample scholarship plans in the appendix as well as suggestions for midterm check-ins with members on academic probation.
- 4. Welcoming new members.** The [New Member Pursuit Facilitator Guide](#) was recently updated and is a one-stop-shop for all information and tips related to the new member pursuit. A tip for advisers – review the sections on learning through small groups to support officers in being intentional about incorporating into their new member meetings.
- 5. For the DG history lovers.** Some of the DG history components have been removed from the New Member Pursuit, so the member education team may be interested in incorporating DG history in other parts of chapter programming! Host a trivia game during chapter meetings or include DG history tips in a weekly newsletter. The Delta Gamma library has a resource on the [history of our badge](#) and individual chapter histories.

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MEMBERSHIP ADVISER

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The categories that include Standards related to the vp: membership are: Recruitment.

- 1. Recommendation process for collegians and alumnae.** Did you know that any member can complete a Recommendation Form for any PNM? As membership adviser, you may receive questions about sponsoring a PNM from collegiate and alumnae members. Recommendation Forms can be submitted by any member through the Delta Gamma website. In addition to the Recommendation Form, collegiate members can now sponsor a PNM directly in MyVote.
- 2. Continuous Recruitment.** As an adviser, you play a key role in helping motivate the chapter to participate in successful continuous recruitment or COB. Sometimes a chapter may feel discouraged if they are below campus total, and your enthusiasm can help them see what a positive opportunity this is to add amazing new members to their chapter.
- 3. Voting Round.** Are you familiar with Delta Gamma's recruitment voting model and methods? Voting can be technical and stressful during recruitment and may cause officers to lean on adviser support. There are [Primary Recruitment Voting Guide resources](#) to review and incorporate into recruitment preparation to help you and the chapter feel ready to take on this component of the recruitment process.
- 4. Preference Round makes a meaningful impression.** An area of opportunity for many chapters is to bring more intention to and strengthen their preference round. There are multiple options chapters can choose from when creating their preference ceremony. Refer to the [Recruitment Confidential](#) for ideas. Encourage chapters to practice their preference round conversations first so that they do not lose time doing this at the end of recruitment preparation.
- 5. Recruitment Prep Workshops, let's do this!** The recruitment team works hard to ensure all members are prepared for a successful recruitment. Feeling lost on where to start when working on prep items with the collegiate officers? A series of [RPW resources](#) have been created for you in the Delta Gamma library. Start with these outlines and support the chapter with including additional items that resonate with their chapter.

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PANHELLENIC ADVISER

Learning the basics of the officer you support?

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The categories that include Standards related to the vp: Panhellenic are: Operations and Community.

- 1. Empowering vp: Panhellenic: a leader on campus and in the chapter.** As an adviser, you can play a pivotal role in empowering vp: Panhellenic to view themselves as a leader both in their chapter and in the campus community. Encourage the officer you work with to evaluate the role vp: Panhellenic has previously held in the chapter and opportunities for expanding their position and voice within the community.
- 2. Panhellenic team contacts.** There are a variety of contacts and resources that make up the Panhellenic team – the Collegiate Development Specialist (CDS) at Executive Offices, the Panhellenic Support Specialist (PSS) in your region, all the way to the Panhellenic Operations Chairman for the Fraternity. This [flow chart](#) can help outline who to contact for what and when if questions from vp: Panhellenic arise.
- 3. National Panhellenic Conference.** If the officers you work with are interested in learning more about Panhellenic as a whole, encourage them to check out the [NPC website](#). Here they can find information on NPC, programs and resources.
- 4. The vp: Panhellenic routine.** Need some inspiration on where to start? Review the [Anchored in Panhellenic resource](#) with the officer you work with. The Officer Checklist section has tips on establishing a routine as vp: Panhellenic and things to accomplish regularly.
- 5. Promoting Panhellenic leadership opportunities.** Sometimes an aspect of vp: Panhellenic's role that can get overlooked is promoting Panhellenic leadership opportunities within the chapter. Ask the officer you work with about the timeline for applying for roles on Panhellenic Council or Recruitment Counselors and make a plan for how these opportunities will be shared with the chapter to encourage applications.

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FOUNDATION ADVISER

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The categories that include Standards related to the vp: Foundation are: Community.

- 1. Do Good hours.** Members are no longer penalized if they are unable to meet the encouraged eight hours of volunteer work, but service is still an important part of our mission to do good. This [Service for Sight and Do Good Hours resource](#) can help you facilitate a conversation with the vp: Foundation about how to continue a service program within the chapter.
- 2. Member Planet and Venmo Integration.** Successful setup of a Member Planet page and use of the Venmo integration feature, where applicable, is a critical part of a successful fundraising event. No personal, chapter or business Venmo account should be used to collect Foundation fundraising dollars. If chapter officers have questions on using these resources, refer to the Collegiate Fundraising Resource in the [Foundation Focus](#) handbook.
- 3. Foundation + Finance = A Perfect Match.** The collaboration between the vp: Foundation and the vp: finance is important throughout the fundraising event planning, execution and follow-up process. As an adviser, it is helpful to emphasize this partnership and encourage working closely with the finance team.
- 4. Foundation scholarship opportunities.** Ensure that the chapter you work with is aware that Foundation scholarship opportunities are available for them during their time in the chapter and beyond. Sisters Helping Sisters: Need-Based scholarships are awarded on a rolling basis, as funds permit, from August 1 until April 1. Undergraduate Merit-Based Scholarships have an application deadline of March 1 annually and Merit-Based Graduate Fellowships have an application deadline of April 1 annually. Please refer to [this webpage](#) for more information.
- 5. Foundation awareness and education.** Another aspect of the Foundation team's role is to educate the chapter on the Foundation and its efforts. As an adviser, encourage officers to implement opportunities for Foundation awareness throughout the year. There are resources in the Delta Gamma library for implementing [Foundation-related rituals](#), [education during recruitment](#) and more.

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COMMUNICATIONS ADVISER

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The categories that include Standards related to the vp: communications are: Operations and Community.

- 1. Make an appearance in the ANCHORA.** Help remind the officer you work with to submit photos and story ideas to the ANCHORA. Story ideas can be submitted via [this form](#) and photos can be sent to anchora@deltagamma.org. Submissions are due on January 15, April 15, July 15 and October 15.
- 2. Collegiate media relations.** Working with the media can be tricky and there are specific guidelines that collegiate officers must work within. The chapter president and ATC should be informed if the communications team receives a media request. Together, you should alert your Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC), your Regional Director (RD) and your collegiate development specialist (CDS) at Executive Offices. Once this group approves the media request, you can move forward. In most cases, the chapter president will serve as the spokesperson for a chapter.
- 3. Let's take a look at social media.** A helpful exercise you can engage in with the communications officer team is to review social media accounts. Look at the posts as a whole and reflect on these questions: where are each aspect of Article II represented? What do these posts say about the chapter? What aspects of our chapter are we not highlighting? The [Communications Handbook](#) includes tips and examples on powerful social media posts.
- 4. Effective Meeting Minutes.** What should be included in meeting minutes? Why do we take them anyway? Encourage the officer you work with to refer to these [Guidelines for Taking Effective Minutes](#) to take their note-taking to the next level.
- 5. Bylaws and Standing Rules (BLSR) revisions.** The BLSR is a guiding document of the chapter-specific policies. Each year the chapter will create an updated version, and the vp: communications is responsible for guiding this process! Encourage vp: communication to start this process early by reviewing in CMT or JCMT meetings. A model version of the BLSR will be posted on the Delta Gamma library in the spring term of each year.