



PI KAPPA PHI
FRATERNITY

LEADERSHIP CONSULTANT CHAPTER VISIT GUIDE

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THE BOTTOM LINE

Use this check list to make sure you are prepared for your consultant visit.

Ask yourself, “Did I...

- Fill out the Seven Objectives worksheet (in Excel format) –found on www.pikapp.org?
- E-mail the Seven Objectives worksheet to our LC and RG at least three days prior to the visit?
- Schedule all meetings for our consultant?
 - Archon
 - Vice Archon
 - Treasurer
 - Secretary
 - Warden
 - Historian
 - Chaplain
 - Philanthropy Chair
 - Risk Manager
 - Chapter Advisor
 - Greek Advisor
 - Associate Class
 - Chapter Presentation (Chapter Meeting)
 - Focus Group(s)
- Prepare adequate accommodations? Our consultant needs:
 - a clean bed
 - a workspace including a desk
 - internet access
 - house meal plan (if applicable)
- Inform our chapter members of the date of our consultant’s visit?
- Select our focus topic(s)?
- Ensure our chapter leaders have scheduled time to make effective use of the consultant and his time during the visit?
- Gather the following materials?
 - Updated copy of Recruitment Program
 - Updated copy of Associate Member Ed. Program
 - Updated copy of Scholarship Program
 - Updated copy of chapter budget
 - Updated copy of Risk Management Program
 - Updated copy of chapter Code of Conduct
 - Updated copy of chapter Constitution and Bylaws
 - Updated copy of chapter phone and e-mail list
 - Updated copy of chapter calendar
 - Campus Map
- Fill out the “Update Chapter Information” page?
- Fill out the “Update Administrative Information” page?
- Fill out the “Statement of Responsibility” page?
- Fill out the “Visit Evaluation” page?
- Mail the “Visit Evaluation” page back to the National Office?



GENERAL INFORMATION

Pi Kappa Phi's leadership consultant program exists to provide hands-on servicing to our chapters, allowing our members to take advantage of experts in the field of fraternity chapter operations. Your leadership consultant will work with you to identify areas for improvement within your chapter and determine ways to overcome those challenges. During the visit he will observe and assess the things your chapter is currently doing well in order to pass your success on to other chapters of Pi Kappa Phi and recommend your chapter for national Pi Kappa Phi awards.

VISIT FORMAT

Seven Objectives of Chapter Excellence

The Seven Objectives of Chapter Excellence report is the primary method for your chapter can measure its success relative to chapters on your campus, and then compare your chapter's performance to our fraternity's national standards. By filling out the Seven Objectives of Chapter Excellence report and returning it to your leadership consultant and regional governor, you will enable them to understand the current strengths and challenges of your chapter. In addition, the report will enable your chapter to track its improvements over time.

Focus Topics

The chapter has the opportunity to select up to two of the Seven Objectives or key areas of strategic focus in which you would like your leadership consultant to provide specific and detailed attention. Chapter brothers should work in a small group to address the needs in these areas. This focus group will set specific goals and create a detailed action plan to make upgrades in the area. This action plan will be presented to the executive council and then the chapter membership for input and approval.

Individual Officer Meetings

Your leadership consultant will meet one-on-one with the archon, vice archon, treasurer, philanthropy chairman and risk manager as well as any other requested individual officers and committee chairmen to consult and assist them in their particular area of responsibility.

Group Meetings

The executive council, the associate member class, and the chapter as a whole are all required to participate in meetings respectively, to be held during the consultant visit.

Advisor Meetings

Your consultant must meet with your chapter advisor, academic coach and Greek advisor to coordinate efforts to make improvements within your chapter. It is the chapter's responsibility to arrange these meetings for the leadership consultant prior to his visit.



MAKING THE BEST USE OF YOUR LEADERSHIP CONSULTANT

Before the visit:

- 1. Fill out the Seven Objectives worksheet (in Excel format) and e-mail it to your consultant and regional governor. (The Seven Objectives worksheet is available by choosing “resources” from the drop down menu in the downloads section on the Web site at www.pikapp.org)
- 2. Schedule all meetings to have with your consultant. (Refer to the following pages for scheduling information.)
- 3. Prepare adequate accommodations^{††}. Your consultant will require:
 - a. a clean bed
 - b. a workspace including a desk
 - c. internet access
- 4. Inform your chapter members of the date of the consultant’s visit.
- 5. Ensure your chapter leaders have scheduled time to make effective use of the consultant and his time during the visit .

During the visit:

1. Make your consultant feel welcome. Remember the lessons of our Ritual as this brother visits your chapter.
2. Remember your consultant does not have a house key or a meal plan; he may not even know where the closest bathroom is. Remember to help him out.
3. Be open and honest about your chapter. Your consultant is not visiting to “police” your chapter; he is there merely to offer aid and guidance.
4. Show off your chapter, school and community. Arrange campus and community tours for local points of interest if possible.
5. Your chapter can expect that your consultant will NOT participate in any activities that violate the Pi Kappa Phi Risk Management Policy.

After the visit:

1. Fill out your Chapter Visit Evaluation Form.
2. Follow up on action plans created during the consultant visit.

†† If sufficient accommodations are not made, your consultant may end up billing your chapter for a hotel room. Do not let this happen unexpectedly!



SCHEDULING INFORMATION

Preliminary Executive Council Meeting

What: Introductory meeting to set the tone and agenda for the consultant visit and finalize visit schedule. Focus topics will be discussed and members to be included in focus groups assigned.

Who: All executive council members, the philanthropy chairman, the risk manager and other key chapter leaders such as the standards board chairman and chairmen of major committees should attend.

When: Within two hours of the consultant's arrival

Preparation: Attendees should come prepared to discuss goals and schedules for the leadership consultant visit. Bring your written programming, a pen and paper to this meeting.

Individual Officer Meeting

What: Meetings with each officer individually to discuss specific areas of responsibility, consult each officer on how to do their job more effectively and complete administrative responsibilities.

Who: Archon, vice archon, treasurer, philanthropy chairman, risk manager and other officers or chairmen of major committees as needed.

When: Throughout the visit. Scheduling can be flexible depending on availability of officers. Officers should plan on at least one hour for their meeting.

Preparation: Officers should bring all materials pertinent to their position including their Pi Kappa Phi officer manual provided by the National Headquarters. Bring a pen and paper to this meeting.

Focus Group Meetings

What: Small group meetings to set focused goals and create specific action plans to bring about change in the selected objective of chapter excellence or area of focus. Group meetings will be facilitated by the consultant and supported by chapter leaders.

Who: To be determined by the executive council and leadership consultant at the preliminary meeting. This should include the officer with responsibility for the chosen objective as well as the committee whose area of responsibility includes the selected objective.

When: To be determined by the consultant and focus group members.

Preparation: Focus group members should bring materials pertinent to the specific objective as well as new ideas, energy and a desire to create positive change within the chapter. Bring a pen and paper to this meeting.

Follow-Up Meeting

What: Opportunity for work teams to present their product to the executive council and key leaders for input and approval.

Who: Same as Preliminary Executive Council Meeting.

When: On the final full day of consultant Visit.

Preparation: Attendees should be prepared to discuss the focus topic and evaluate and augment the focus group's suggestions. Bring a pen and paper to this meeting.

Chapter Meeting / Presentation

What: The purpose of this meeting is twofold. First, it is an opportunity for the leadership consultant to address the entire chapter on issues of importance to the entire membership. Second, it is an opportunity for the focus group to present their recommendations to the entire chapter delegation for approval and action.

**You do not need to move your regularly scheduled chapter meeting to another date or time; hold an additional brief meeting if necessary.*

Who: The entire chapter membership.

When: This may not correspond to your normal chapter meeting time, but special arrangements should be made. It is required that you either reschedule your regular meeting, or hold a separate brief meeting to allow for the chapter presentation.

Preparation: Chapter members should come prepared to discuss the objective areas and vote to implement the focus group's recommendations if appropriate. Bring a pen and paper to this meeting.

Associate Member Class Meeting

What: This meeting will provide an opportunity for the leadership consultant to address the associate member class as a whole to discuss issues of importance to this audience.

Who: All members of the current associate member class. Active members need not attend.

When: Flexible. Attendees should plan on at least one hour for this meeting.

Preparation: Associate members should come prepared to discuss the greater fraternity and should bring materials to take notes.



SCHEDULING WORKSHEET

To be completed prior to visit and provided to consultant upon his arrival to your chapter

Leadership Consultant Name: _____

Visit Dates: Arrive: _____ Depart: _____

Consultant Accommodations: _____
 (A clean bed and work-space including a desk are required)

Focus Topic Selections: (select one area in which you would like your consultant to concentrate his efforts):

- Recruitment Success
- Academic Achievement
- Living the Ritual
- Effective Chapter Alumni Relations
- Other _____
- Superior Associate Member Education
- Sound Chapter Operations
- Commitment to Service
- Risk Management

Required Meetings: (See Chapter Visit Scheduling Information page for explanation of meetings)

MEETING	DAY REQUIRED	DATE/TIME	LOCATION
Preliminary Executive Council Meeting	First day of visit		
Archon:	First day of visit		
Vice Archon:	Flexible		
Treasurer:	Flexible		
Secretary:	Flexible		
Warden:	Flexible		
Historian:	Flexible		
Chaplain:	Flexible		
Philanthropy:	Flexible		
Risk Manager/Social:	Flexible		
Greek Advisor:	Second full day of visit		
Chapter Advisor:	Flexible		
Focus Topic 1:	Flexible		
Focus Topic 2:	Flexible		
Follow-Up Key Leader Meeting	Flexible		
Chapter Presentation	At a chapter meeting		
Associate Member Meeting	Flexible		

Provide the following materials to your Consultant upon his arrival to the chapter; *either paper or electronic*:

- Updated copy of Recruitment Program
- Updated copy of Associate Member Ed. Program
- Updated copy of Scholarship Program
- Updated copy of chapter budget
- Updated copy of Risk Management Program
- Updated copy of chapter Code of Conduct
- Updated copy of Constitution and Bylaws
- Updated copy of chapter phone/e-mail list
- Updated copy of chapter calendar
- Campus Map



UPDATE CHAPTER INFORMATION

To be completed by the secretary and the executive council prior to your consultant visit and provided to your consultant during your first meeting

Chapter Designation: _____ Chapter Phone Number: (_____) _____ - _____

Chapter mailing address (USPS): _____

City _____ ST _____ Zip _____

Chapter shipping address (DHL, UPS, FEDEX): _____

City _____ ST _____ Zip _____

Chapter e-mail: _____

Chapter Web site address: _____

Archon name/phone: _____ (_____) _____ - _____

e-mail: _____

Vice archon name/phone: _____ (_____) _____ - _____

e-mail: _____

Treasurer name/phone: _____ (_____) _____ - _____

e-mail: _____

Secretary name/phone: _____ (_____) _____ - _____

e-mail: _____

Warden name/phone: _____ (_____) _____ - _____

e-mail: _____

Historian name/phone: _____ (_____) _____ - _____

e-mail: _____

Chaplain name/phone: _____ (_____) _____ - _____

e-mail: _____

Philanthropy Chair name/phone: _____ (_____) _____ - _____

e-mail: _____

Risk Manager name/phone: _____ (_____) _____ - _____

e-mail: _____

Standards Board name & phone: _____ (_____) _____ - _____

e-mail: _____

Number of men pre-initiated this term: _____

Number of men initiated this term: _____

Number of men leaving this term: _____

Date of next initiation: _____ / _____ / _____ Associate class (check one): FALL or SPRING

Date of next pre-initiation: _____ / _____ / _____ Associate class (check one): FALL or SPRING

Date of next officer elections: _____ / _____ / _____

Last day of class for the semester: _____ / _____ / _____



UPDATE ADMINISTRATIVE INFORMATION

To be completed by the Treasurer prior to your consultant visit and provided to your Consultant during your Treasurer's meeting

Provide the following information regarding your chapter's financial status:

Cash in chapter checking account:

\$ _____

Cash in chapter saving account:

\$ _____

Past due accounts receivable (money owed to the chapter):

\$ _____

Total accounts payable (money owed by the chapter):

\$ _____

Account payable to the National Headquarters:

\$ _____

Number of brothers who owe greater than \$100.00:

List brothers owing more than \$100.00: (no action will be taken by the national office unless your chapter begins the process, this is solely an indicator)



STATEMENT OF RESPONSIBILITY

To be completed by the executive council prior to your consultant visit and turned in to your consultant during your first executive council meeting

PI KAPPA PHI FRATERNITY

**Statement of Responsibility of Chapter Officers
regarding FI PG and Risk Management**

As an officer of the _____ chapter at _____,
I have read the Pi Kappa Phi Risk Management Policy. I understand that as a responsible officer
of my chapter, the other Executive Committee members and I have the duty to actively enforce
these regulations and that violations of these regulations by any member of the chapter could
result in fraternity disciplinary proceedings and civil and / or criminal penalties.

I also understand that it is my responsibility to share these regulations with all the members of
my chapter.

I accept the terms of the above statement of responsibility. _____
Date

_____	_____
Archon Print Name	Archon Signature
_____	_____
Vice Archon Print Name	Vice Archon Signature
_____	_____
Treasurer Print Name	Treasurer Signature
_____	_____
Secretary Print Name	Secretary Signature
_____	_____
Warden Print Name	Warden Signature
_____	_____
Historian Print Name	Historian Signature
_____	_____
Chaplain Print Name	Chaplain Signature
_____	_____
Social Chairman / Risk Management Specialist Print Name	Social Chairman / Risk Management Specialist Signature



FREQUENTLY ASKED QUESTIONS

- What is a leadership consultant, what do they do?
Your leadership consultant is a trained staff member who travels to chapters and assists them in all areas of chapter operations. Your consultant will be able to help you with virtually any project, program, or task. You should have things ready for him and use him while he is with you. He is there to help you achieve and enhance your chapter's goals and visions.
- How am I supposed to get internet access for our consultant?
Go to either your library or internet technology office on campus. Tell them you have a guest coming to campus to work with your organization and you need a temporary internet pass or code. Almost every campus will have a system similar to this for you to use.
- Where is this Seven Objectives thing?
Go to www.pikapp.org/downloads/downloads; choose resources from the drop-down menu and click go; choose [7 Objectives Report Explanation.pdf](#) and/or [7 Objectives Report.xls](#).
- What do I have to prepare for the consultant?
Use the check list at the beginning of this guide.
- Do I have any “follow-up” tasks?
Yes. Fill out the Chapter Visit Evaluation Form and mail it back to the national office.
- What do I do if I can't get a meeting scheduled with someone?
Keep lines of communication open between you and your consultant. Chances are it will not turn into a big deal if the proper planning is in place.
- If we don't have accommodations for the consultant, do we (the chapter) have to pay for a hotel?
It is the chapter's responsibility to find a place for the consultant to stay (e.g. the fraternity house, a brother's apartment, a hotel, etc.). Steer clear of surprises regarding accommodations, and be prepared.



CHAPTER VISIT EVALUATION FORM

Print and return this form, which is to be completed by the archon and the executive council after the leadership consultant visit. Please use additional space on the back!

Chapter _____ at _____ Consultant _____

Please assist the National Office in maintaining the quality and effectiveness of the leadership consultant program by completing the following evaluation.

1. Please provide a rating of 1 to 5 (1 being the lowest and 5 being the highest) and any comments you may have, use additional space on the back

Focus Group(s)	1	2	3	4	5
Officer Meetings	1	2	3	4	5
Group Meetings	1	2	3	4	5
Consultant's Professionalism	1	2	3	4	5
Overall Effectiveness	1	2	3	4	5

2. Please check **YES** or **NO** to the following questions:

Did you provide the consultant with a completed visit schedule upon his arrival?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did the consultant complete all of the items you scheduled for his visit?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did the consultant present himself professionally at all times?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Would you like this leadership consultant to visit your chapter again?	<input type="checkbox"/> YES	<input type="checkbox"/> NO

3. In what area of focus was the consultant most beneficial to your chapter?
4. What was the most helpful suggestion given to you by your leadership consultant?
5. In what ways or areas was the consultant least beneficial to the chapter?
6. What other information would you like to share with us?

Archon's Signature _____ Date _____

Please return completed form to:
 Pi Kappa Phi National Headquarters
 Attention: Brandon Belote, Director of Chapter Services
 P.O. Box 240526, Charlotte, NC 28224

*You may also put this form in a sealed envelope and have your consultant return it for you.