

PHI KAPPA THETA FRATERNITY

Chapter Operations

Chapter Leadership Checklist

To help chapter leaders prepare for the Fall 2020 semester, the Fraternity suggests a 3-step approach. Each outlines best practices to complete and the members responsible for them. Please contact your chapter's Performance Coach for any questions.

Step 1: Learn and Clarify-

Gain important information and guidance before creating a plan. Always start with ensuring that you are following CDC, state, local and institutional expectations. To make sure you have the most accurate information leaders should accomplish the following:

- **Local and State Guidance:** Find local guidelines on masks, social distancing, and gathering sizes.
 - Officer responsible: president
- **Institutional Guidance:** Contact the fraternity and sorority life advisor to review institutional guidelines on masks, social distancing, gathering sizes, recruitment policies, housing and any other institutional changes due to COVID-19.
 - Officer responsible: president
- **Fraternity Guidance:** Review COVID-19 operational pages on phikaps.org/covid19
 - Internal Operations – Chapter President
 - Finances – VP of Fraternal Development or Treasurer
 - Recruitment – VP of Social Development or Recruitment Chair
 - Programming – VP of Social Development
 - Risk Management – Chapter President or Risk Management Chair
 - Housing – House Manager, if applicable

Step 2: Create a plan-

Officers should meet with each other to develop plans for the fall. First, create plans at the board/committee level. The executive board should then review the information and combine into one "master plan" for the chapter.

- **Executive Board-** Hold a meeting to discuss information learned from reviewing resources at phikaps.org/covid19 as well as state/local/federal expectations.
Be sure to construct a plan for the fall semester that includes:
 - How will social, brotherhood, philanthropy, etc. events be hosted? (In person, virtually, hybrid)
 - How many people are allowed to attend these events?
 - If events are in person, what social distancing and mask policies will be enforced?
 - Will the chapter be decreasing the number of events held during the fall?
- **Treasurer / VP Fraternal-** Hold a meeting to discuss the financial plan for Fall that includes:
 - Changes to the chapter budget
 - Dues assessment and collection (how much will dues be this year?)
 - Any other changes to the chapters finances due to COVID-19
 - Where can budget cuts be made? (What line items are essential vs. non-essential?)

- **Recruitment-** Key chapter leaders should hold a meeting to discuss information learned from reviewing on phikaps.org/covid19 and other resources, as well as create an updated recruitment plan for the fall that includes:
 - What is an ideal and realistic goal for recruitment, given social restrictions?
 - Where recruitment activities will occur (in person, virtually, hybrid)
 - How the bid voting process will occur (in person, virtually, hybrid)
- **Associate Member Education-** AM Educator and key leaders should Hold a meeting to discuss information learned from reviewing resources at phikaps.org/covid19. Create a plan that includes:
 - How will new member education be conducted (in person, virtually, hybrid)
 - Don't forget that new member education is available in online module format!
 - How/where the Associate Member Ritual and Initiation Ritual take place
- **For Chapters with Housing-** Chapter president, performance coach, house corporation president, risk management chair should hold a meeting to discuss and prepare a plan for housing for the 2020-21 academic year that at minimum covers the following
 - Plans for sanitation
 - What to do if someone in the house contracts COVID-19
 - Move-in logistics
 - Communication protocols
- **Executive board-** After all teams have met and created their plans, hold a meeting in order to discuss these plans in depth and develop one "master plan" for the chapter. Things that should be included are:
 - Where chapter, executive board, administrative board, and committee meetings will take place (in person, virtually, hybrid)
 - Finance board's plan for dues assessment and collections.
 - Recruitment committee's plan for fall 2020 recruitment
 - Chapter housing plan (for chapters with housing)
 - Plans for chapter events (how the chapter be hosting social, brotherhood, philanthropy, etc. events)

Step 3: Communicate the plan-

Once the Master Plan has been developed, the next step will be communicating this plan to the chapter

- **Chapter President, Performance Coach, Secretary** should work together to send a copy of the Master Plan to all returning and new members of the chapter. The President should also review this plan with the full chapter at the first chapter meeting of the semester.
- **Chapter President, House Manager, and Secretary** should work together to provide a full copy of the Master Plan to all parents/guardians of returning brothers and new members. Accurate contact information should be provided in case of questions.
- For future use and revision, document these plans in your 2020-2021 Asana Project.