Advising and Best Practices (Open Forum Discussion)

Minutes

Welcome and Introductions
This session is designed as an open forum and discussion for advisors to exchange ideas and best practices with one another. Presenters served as moderators and also offered input; however, discussion content was largely generated by the collective group.

17 advisors in attendance introduced themselves including name, affiliation, advisory role/relationship to the chapter, and years of service to the chapter

Reflection
From an advisory perspective, asked advisors to take a moment to consider the following:
- What are you (and your chapter) doing well that you’d like to share with others? (best practice)
- What challenge or issue are you (and your chapter) facing and seeking feedback on? (feedback/idea exchange)

Discussion
Remaining time was allotted for discussion of the following topics:

- **Recruiting Alumni Volunteers**: Discussion focused on how best to recruit “new blood” and “fresh faces” to join alumni boards and serve in an advisory capacity. Some recommended relying on the national organization to assist with this front as well as recruit local alumni not necessarily affiliated with Lehigh. Others recommended reaching out to individuals specifically to “micro volunteer” and then engage them more fully at a later date. Most agreed that a blend of seasoned advisors and new faces to round out an advisory board is best as well as accounts for natural attrition.

- **Alumni Participation at Chapter Meetings**: Considered a best practice and recommended by many. Folks agreed that this a) builds relationships, b) allows for most in-depth observations/understandings, and c) provides opportunities for feedback to membership.

- **Supporting Chapter Efforts**: Considered a best practice. For example, attending Accreditation presentation, participating in the chapter’s fundraiser or philanthropic event, etc.

- **Standards Processes**: Must have to encourage good behavior and address missteps.

- **Elections and Transitions**: Much discussion on timeline for election processes. Some discussion about pros and cons of academic year cycle vs. calendar year cycle. Considerations should be given to national headquarters offerings (e.g. When are leadership experiences? January or Summer?); recruitment schedule; study abroad implications, etc. Discussion about importance of requiring strong transition effort to a) build team, b) pass down knowledge and resources from previous leadership to new leadership, and c) establish goals for coming year. Mentioning of Lehigh Ropes Course as a venue for building team. OFSA staff also offer transition workshops upon request.

- **Interdependence**: Discussion focused on the balance between chapter autonomy and need for advisors to step in/command. Assisting chapter leadership to articulate goals and why of decisions, efforts, requirements, etc. is important (otherwise, message is shared that “Alumni said so, that’s why…”)

- **Run Chapter Operations as a Business**: Chi Phi alumni advisor shared his approach and philosophy. He delivered a presentation to the chapter membership asking them to approach
the fraternity as a business and their role as investors. Will share copy of his presentation with attendees.

- **Update Bylaws:** Recommended as a regular process so as to aide in transition efforts and ensure sustainability.

- **Study Abroad Work Arouns:** Many shared challenges with large portion of membership (typically junior class) studying abroad in spring semesters and how this removes a number of highly qualified, mature leaders from assuming roles. Some recommended transitioning new members early alongside shadowing opportunities. Others suggested creating a pipeline where seniors mentor sophomores.

- **Sharing Resources:** Many requested a hub to share resources. OFSA is creating a resource hub on our website specifically for advisors. Others suggested additional networking and partnering up to learn from one another based upon specific needs.

- **Burnout:** Some suggested taking the opportunity to teach delegation. Others recommended giving their leadership “the night off” so that others could be tapped and assume a role, giving others a much needed break. The idea of letting some things fail generated a good bit of synergy, meaning leadership can let an event or program fail (or fail forward) and use as a teaching moment; however, risk management, membership education, finances, etc. are non-negotiable.

**Wrap Up & Thank You**