



**IEEE-Eta Kappa Nu  
(IEEE-HKN)**

**Faculty Advisor Checklist**

**Revised December 2018**

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**Faculty Advisor Timeline and Checklist of IEEE-HKN Chapter Activities**

## **Preface**

This document is designed to help streamline annual planning and on-going operations for IEEE-HKN Faculty Advisors (though the information could be useful to others as well, including chapter officers and beyond). If your chapter is looking to recruit or train a new advisor, or if you are an advisor wanting more background on the position as well as IEEE-HKN, please first see the [IEEE-HKN Faculty Advisor Handbook](#) for a more complete introduction.

It is important to note that the role of an IEEE-HKN Faculty Advisor is, as the name implies, primarily to *advise*. The operations and activities of the chapter should be planned and executed by the student officers as a form of leadership development. You will note that most items in the checklist have officers listed as the responsible party, though the advisor should always be aware of the activities and ensure that officers are aware of the items, their deadlines, and are following through. There are some items that do fall primarily to the advisor due to privacy or other reasons, but in general this checklist is designed to guide an advisor's interactions with the chapter officers.

## **Chapter Classifications**

Timely completion of the items in this checklist are the primary basis of a chapter's classification, and thus it is important for a Faculty Advisor to understand the requirements for each classification.

**Active Chapter:** This is the base level for a chapter. To be officially recognized as an active chapter, it is required that the chapter **(1) holds inductions** (at least annually) and [submits the induction form](#) to the national office; **(2) holds officer elections** (at least annually) and [submits the new officer information](#) to the national office; and **(3) submits an annual report** to the national office.

If your chapter has become inactive (which can happen if it fails to meet the requirements for at least two straight years), you can petition to [reactivate your chapter](#). If your university does not currently have a chapter, you can petition to [form a new chapter](#) if your institution meets the qualifications.

**Key Chapter:** It is desired that *ALL* active chapters should work to reach Key Chapter status, and this should be a realistic goal for any chapter regardless of size or institution type. It is important to note that Key Chapter is a recognition, not an award, which means that if your chapter meets the requirements listed here it **will** receive Key Chapter recognition. Key Chapter recognition can be earned annually by meeting all of the following requirements (notice the first three are merely the requirements to be an active chapter coupled with submission deadlines, so only timeliness and requirement four are needed to lift your chapter to Key Chapter status):

1. Submit the [Annual Chapter Report](#) *no later than June 30*;
2. Submit the [Notice of Election of Officers](#) *within one week of your election*;
3. Submit the [Induction paperwork](#) *either before or within one month of your induction*;

4. Complete **at least three of the following** Chapter Engagement and/or Chapter Outreach activities (which must be described in your Annual Chapter Report to be identified):
  - a. Chapter Engagement
    - i. Send one or more representatives to the [Student Leadership Conference](#)
    - ii. Hold [Founders Day](#) events
    - iii. Submit multimedia submission to the national office via [info@hkn.org](mailto:info@hkn.org)
    - iv. Submit one or more nominations for [IEEE-HKN Awards](#)
  - b. Chapter Outreach
    - i. Hold Alumni Events
    - ii. Perform STEM Outreach
    - iii. Organize Chapter/Student Mentoring
    - iv. Participate in Inter-Chapter Activities
    - v. Perform Community Service

**Outstanding Chapter:** Unlike Key Chapter recognition, which could be possible for each chapter to earn every year, the [Outstanding Chapter Award](#) (OCA) is a competitive program. The OCA program recognizes excellence in IEEE-HKN chapters for their activities. The award is based on the content and description of chapter activities that are contained in the Annual Chapter Report. While the selection is based on an overall evaluation of a chapters activities, to be selected for this award a chapter would need to go well above and beyond the minimum requirements of Key Chapter recognition. This is the highest honor for a chapter, and one for which we hope your chapter will strive.

### **Faculty Advisor Timeline and Checklist of IEEE-HKN Chapter Activities**

The items in the following table describe central elements for an IEEE-HKN chapter, and gives information for a chapter advisor to see that these are done. For each item, you are given the following information: Category, Name, Timing, Responsible Party, Details, and Links/Contacts. Here is a key to this information:

Category: **G:** General      **K1:** Chapter Report      **K2:** Officer Elections  
**K3:** Inductions      **K4:** Chapter Engagement or Chapter Outreach      **E:** Encouraged

Items marked **G** do not fit well in other categories, but are necessary for normal chapter operations. Items marked **K1**, **K2**, and **K3** are required both for being an active chapter and for Key Chapter recognition. Note that inductions are divided into multiple items in the table; thus, all **K3** items are required. Items denoted **K4** cover a wide variety of Chapter Engagement and/or Chapter Outreach activities. Note a minimum of three **K4** activities are also required to be a Key Chapter. Items denoted **E** are strongly encouraged, but not required.

The other information in the table is rather self-explanatory, though it is worth noting that the table is organized by “Timing,” with those items that are on-going listed first, followed by an annual schedule. Also, “Responsible Party” is who should do the item, but the point of this table is that as Faculty Advisor, you should make sure that person does the item (and does so on time).

<input checked="" type="checkbox"/>	Category	Name	Timing	Responsible Party	Details	Links/Contacts*
<input type="checkbox"/>	G	Business and Program Meetings	On-going	President should conduct meetings, though Vice President often tasked to arrange speakers, etc.	Chapter should schedule regular meetings (at least once per month during the academic year)	See the <a href="#">Faculty Advisor Handbook</a> for best practices.
<input type="checkbox"/>	G	Financial Activities of Chapter	On-going	Treasurer & Advisor	<p>If your chapter has a checking account, the Faculty Advisor should be a co-signer. Be sure to follow any of the financial rules governing student organizations at your University. If you need an EIN (employer identification number), use: EIN 13-1656633.</p> <p>The legal name associated with this EIN is "Institute of Electrical and Electronics Engineers Incorporated." The chapter should use this name followed by the name of the Chapter.</p>	<p>As needed, the IEEE W-9, and other tax information is available on the <a href="#">IEEE tax page</a>.</p> <p>If you receive a notice from the IRS, please scan &amp; send to <a href="mailto:info@hkn.org">info@hkn.org</a></p>
<input type="checkbox"/>	G	Student Organization	On-going (scheduled activities set by university)	Chapter can assign officer to be primary contact, though university may require all officers & Faculty Advisor to have training, etc.	It may be useful (if not required) to register your chapter as an official student organization with your university. Be sure your chapter is in compliance with all university regulations.	Check your university website for details
<input type="checkbox"/>	E	Faculty Advisor Conference Calls	On-going; times vary, but about three per year	Faculty Advisor	All Faculty Advisors will be invited to participate in conference calls discussing issues of concern to Advisors and chapters. Notes will be distributed by email afterwards.	Email <a href="mailto:info@hkn.org">info@hkn.org</a> with questions

<input type="checkbox"/>	K4	Multimedia submission	On-going**	President, Secretary, THE BRIDGE Correspondent, etc.	Submit pictures, videos, articles, etc. to the National Office about chapter activities.	Send material or inquire about a submission to THE BRIDGE via email at <a href="mailto:info@hkn.org">info@hkn.org</a> See also the <a href="#">media page</a> and <a href="#">THE BRIDGE</a> .
<input type="checkbox"/>	K4	Alumni engagement	On-going**	President and/or Vice-President with Faculty Advisor facilitation	Interaction with alumni, including but not limited to talks. The Faculty Advisor can be a link between the officers and alumni.	In addition to your own alumni, the <a href="#">national office</a> can help you connect with other alumni in your area.
<input type="checkbox"/>	K4	Student mentoring	On-going**	President and/or Vice-President	Create a program in which your upper-level and graduate students can mentor younger students. This can go well beyond a tutoring program to include advice about classes, career or graduate school preparation, etc.	Get ideas from the IEEE-HKN <a href="#">media page</a> .
<input type="checkbox"/>	K4	Inter-chapter activities	On-going**	President and/or Vice-President (with possible Faculty Advisor facilitation)	Arrange activities with other IEEE-HKN chapters in your area. It can be helpful for the Faculty Advisors to be involved in logistics.	Find other chapters through the <a href="#">university chapters page</a> , meet others at the <a href="#">SLC</a> , or connect via your <a href="#">Regional Governor</a> or the <a href="#">national office</a> .
<input type="checkbox"/>	K4	Community service	On-going**	President and/or Vice-President	Chapter volunteer activities and philanthropic efforts (not inclusive of STEM outreach or student mentoring, which are listed separately).	Get ideas from the IEEE-HKN <a href="#">media page</a> .

<input type="checkbox"/>	K4	STEM outreach	On-going**	President and/or Vice-President (with possible Faculty Advisor facilitation)	Organize STEM programs for the public, local schools, etc.	Get ideas from the IEEE-HKN <a href="#">media page</a> .
<input type="checkbox"/>	E	Encourage Interaction with IEEE Student Branch+	On-going	Faculty Advisor	Work with IEEE Student Branch Counselor, connect officers with student branch counterparts, and encourage collaboration.	Find your IEEE Student Branch Counselor through your department.
<input type="checkbox"/>	E	Providing Broad Perspective+	On-going	Faculty Advisor	Give a broader perspective of HKN, IEEE, and industry. Either directly, or by connecting the chapter officers with relevant speakers, give the chapter resources about the IEEE sections, technical groups, etc.	The <a href="#">IEEE website</a> and the <a href="#">IEEE-HKN website</a> have many resources.
<input type="checkbox"/>	G	Planning Meeting	Beginning of academic year (useful to also have one at beginning of each academic term)	Chapter Officers & Faculty Advisor	Arrange to meet with the chapter officers to plan the chapter activities for the coming year. Make sure you have all of the officers' contact information and they have yours.	As desired, contact <a href="#">national office</a> to set up a conference call to assist you and the officers in planning.
<input type="checkbox"/>	K1	Chapter Report***	Due <b>June 30</b> each year (to be considered for Key Chapter); no later than September 30 to remain active chapter	President with the Secretary	Prepare an accurate and detailed account of chapter activities. This is the primary record of your chapter, and also serves as the basis for Outstanding Chapter Awards.	Submit via <a href="#">form</a> on website
<input type="checkbox"/>	E	Vote in Board of Governors Election	Ballots available by September 1; Voting open October 1- November 1	President overseeing vote of entire chapter	Chapter should have a meeting to discuss the candidates and to decide who the chapter would like to elect.	Information available on the <a href="#">Board of Governors page</a> on the IEEE-HKN website

<input type="checkbox"/>	K4	Founders Day	October 28 (activities can be held throughout the month)	Chapter Officers	Founders Day is the annual celebration of the anniversary of the founding of HKN.	Materials and activity ideas available on <a href="#">Founders Day page</a> of IEEE-HKN website
<input type="checkbox"/>	K3	Recruitment	Plan early enough in semester to be ready for inductions	Chapter President with Faculty Advisor	Due to privacy laws, the Faculty Advisor is generally responsible for determining academic eligibility & providing list to the Chapter President for invitations. For undergraduates, the requirements are: (1) in top 20% of class if completed 3/8 of degree requirements; (2) in top 25% of class if completed 1/2 of degree requirements; (3) in top 33% of class if completed 3/4 of degree requirements.	Full membership criteria for all levels (undergrad, grad, faculty, & professional) can be found in the <a href="#">Operations Manual</a> . The website has a page with <a href="#">info for perspective members</a> . Other useful info on <a href="#">chapter operations page</a> .
<input type="checkbox"/>	K3	Pre-induction Activities	Between invitations and inductions	Chapter President	If your chapter requires prospective members to perform a service project or other activity prior to induction, be sure it is in line with the ideals of IEEE-HKN and within the guidelines of your university.	Verify policies of your university and consult your chapter operations manual.
<input type="checkbox"/>	K3	Inductions	Prior to end of academic year (or term if inductions each semester)	Chapter President	Organize and hold induction ceremony. Faculty Advisors should attend if possible, and encourage the attendance by other faculty and administrators. Be sure new members are properly reported to the national office.	IEEE-HKN pins and other materials for induction available via the <a href="#">IEEE-HKN Store</a> . Sample <a href="#">induction ritual script</a> available. Complete <a href="#">induction form</a> .

<input type="checkbox"/>	K2	Officer Elections	Prior to end of academic year (or term if elections each semester)	Chapter President	Hold a meeting for officer nominations, and a subsequent meeting for elections. Officers (with the help of the Advisor as needed) should actively seek nominations. Report results to the national office in a timely manner.	Information about each officer position can be found on the <a href="#">Chapter Leadership Page</a> . Submit the <a href="#">new officers form</a> within a week of the election.
<input type="checkbox"/>	K4	Student Leadership Conference	Date varies by year, but generally in the spring	Any member is eligible to attend, as well as Faculty Advisors.	Great leadership training opportunity at annual conference; consider sending one or more officers. As appropriate, chapter could also apply to host a future SLC.	Information available on <a href="#">SLC page</a> of the IEEE-HKN website
<input type="checkbox"/>	K4	Award Nominations	Nomination Deadlines: May 28 for Outstanding Teacher; June 30 for Outstanding Student; September 30 for Outstanding Chapter.	Chapter nominates Outstanding Teacher; any member in an active chapter can nominate Outstanding Student (requires Advisor certification); no nomination necessary for Outstanding Chapter.	All active chapters can nominate for IEEE-HKN awards, in particular the Alton B. Zerby and Carl T. Koerner Outstanding Student Award and C. Holmes MacDonald Outstanding Teaching Award. Note no nomination is necessary for the Outstanding Chapter Award, as the Annual Chapter Report acts as that nomination.	Details and nomination forms available on the <a href="#">awards page</a> of the IEEE-HKN website
<input type="checkbox"/>	G	New Officer Training	Prior to end of academic year (and prior to end of fall semester if have elections twice per year)	Outgoing and incoming officers with Faculty Advisor	Meet to train new officers in their duties, and update contact information. Greatly facilitated if each officer keeps records of activities and duties.	Information about each position can be found on the <a href="#">Chapter Leadership Page</a> .
<input type="checkbox"/>	G	Order graduation materials	At least three weeks prior to graduation	Graduating members	Recognize accomplishment with IEEE-HKN items at graduation.	Order honor cords and stoles from the <a href="#">HKN store</a> .

□	K1	Chapter Report***	Due <b>June 30</b> each year (to be considered for Key Chapter); no later than <b>September 30</b> to remain active chapter	President with the Secretary	Prepare an accurate and detailed account of chapter activities. This is the primary record of your chapter, and also serves as the basis for Outstanding Chapter Awards.	Submit via <a href="#">form</a> on website
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\* Questions about any of the items can be directed to the National Office staff at [info@hkn.org](mailto:info@hkn.org)

\*\* While listed as “on-going,” some of these might be items that your chapter does not do, or only does as a single event at some point in the year (though hopefully some are part of sustained programs). As there is no specific timeline for these items beyond how they are scheduled by your chapter, they are best listed with on-going items.

\*\*\* Chapter Report is intentionally listed at both the beginning and end of the timeline. While it is strongly recommended and encouraged to submit as soon as you complete the activities for the academic year (meeting the June 30 deadline for Key Chapter recognition), we realize that this does not always happen. Since many officers may not be available over the summer, if your chapter did not get the Chapter Report for the previous academic year in during the summer, you should make sure that they get it in by the strict September 30 deadline during the start of the new academic year.

+ These items are relatively new suggestions to have Faculty Advisors provide their unique knowledge and perspective to the student members to enrich the overall IEEE-HKN experience. Especially since the merger of IEEE and HKN, it is important for IEEE-HKN members to recognize their place in the larger community, and the benefits that are available to them.

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