



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

Faculty Advisor Checklist

Revised November 2021

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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.

I. 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.

A. **Active Chapter:** This is the base level for a Chapter.

1. To be officially recognized as an active Chapter, it is required that the Chapter:
 - a) **holds inductions** (at least annually) and [submits the induction form](#) to IEEE-HKN headquarters
 - b) **holds officer elections** (at least annually) and [submits the new officer information](#) to headquarters
 - c) [submits an annual activities report](#) to headquarters
2. If your Chapter has become **inactive**, you can petition to [reactivate your Chapter](#)
 - a) a Chapter will be designated inactive if it fails to meet the requirements for at least two straight years
3. If your university does not currently have a Chapter, you can petition to [form a new Chapter](#) if your institution meets the qualifications

B. **Key Chapter:** This recognition celebrates Chapters that participate in activities identified as the best practices of successful Chapters. It is desired that *ALL* active Chapters work to reach [Key Chapter status](#), and this should be a realistic goal for any chapter regardless of size or institution type

1. Key Chapter is a recognition, not an award
 - a) if your Chapter meets the requirements listed here it **will** receive Key Chapter recognition

2. 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 completing the fourth requirement are needed to achieve Key Chapter status):

- a) Submit the [Annual Chapter Activities Report](#) *no later than 30 September*
- b) Submit the [Notice of Election of Officers](#) *within one week of your election*
- c) Submit the [Induction paperwork](#) *either before or within one month of your induction*
- d) Complete **at least three of the following** Chapter Engagement and/or Chapter Outreach activities (which must be described in your [Annual Chapter Activities Report](#) to be identified):

(1) *Chapter Engagement:*

- (a) Send one or more representatives to the [Student Leadership Conference](#)
- (b) Hold [Founders Day](#) events
- (c) Submit multimedia submission to IEEE-HKN headquarters via info@hkn.org
- (d) Submit one or more nominations for [IEEE-HKN Awards](#)

(2) *Chapter Outreach:*

- (a) Hold Alumni Events
- (b) Perform STEM Outreach
- (c) Organize Chapter/Student Mentoring
- (d) Participate in Inter-Chapter Activities
- (e) Perform Community Service

C. **Outstanding Chapter:** The OCA program recognizes excellence in IEEE-HKN Chapters for their activities. This is the highest honor for a Chapter, and one for which we hope your Chapter will strive.

1. The award is based on the content and description of Chapter activities that are contained in the [Annual Chapter Activities Report](#).
 - a) In order to be considered for the OCA, the deadline to submit the Annual Chapter Report is *30 June*.
2. Unlike Key Chapter recognition, which could be possible for every Chapter to earn every year, the [Outstanding Chapter Award](#) (OCA) is a competitive program.
 - a) While the selection is based on an overall evaluation of a Chapter's activities, to be selected for this award a Chapter would need to go well above and beyond the minimum requirements of Key Chapter recognition.

II. Faculty Advisor Timeline and Checklist of IEEE-HKN Chapter Activities

A. The items in the following table describe central elements for an IEEE-HKN Chapter, and give information for a Chapter advisor to see that these are done.

For each item, note the following information:

1. Category
2. Name
3. Timing
 - a) those items that are on-going listed first, followed by an annual schedule
4. Responsible Party
 - a) who should address/complete the item
 - b) as Faculty Advisor, you should make sure that person addresses it in a timely manner
5. Details
6. Links/Contacts

Here is a **key** to this information:

Category:

A - necessary to maintain active Chapter status

K1 - required for [Key Chapter recognition](#)

K2 - Chapter Engagement and/or Chapter Outreach activities

- a **minimum of three K2 activities** are also required to be a Key Chapter

E - strongly encouraged, but not required

* Questions about any of the items can be directed to headquarters at info@hkn.org.

<input checked="" type="checkbox"/>	Category	Name	Timing	Responsible Party	Details	Links/Contacts*
<input type="checkbox"/>	A	Business & Program Meetings	On-Going	President - conduct meetings Vice President - often tasked to arrange speakers, etc.	schedule regular meetings (at least once per month)	See Faculty Advisor Handbook for best practices
<input type="checkbox"/>	A	Chapter Financial Activities	On-Going	Treasurer Faculty Advisor	If your Chapter has a checking account, the Faculty Advisor should be a co-signer. Abide by any and all financial rules governing student organizations at your University	IEEE tax info is available at: https://www.ieee.org/about/volunteers/tax-administration/tax-corp-info.html#relevant-identification-numbers The IEEE W9 is available at: https://www.ieee.org/content/dam/ieee-org/ieee/web/org/voluntr/tax-management/2018-07-25-ieee-w-9.pdf If you receive a notice from the IRS, please scan & send to info@hkn.org
<input type="checkbox"/>	A	Student Organization	On-Going (scheduled activities set by university)	Chapter can assign officer to be primary contact Your university may require all officers and Faculty Advisor to have training, etc.	Registering your Chapter as an official student organization with your university can be useful (or required by your university) Ensure that your chapter is in compliance with all university regulations	If you need a letter from IEEE-HKN confirming your status as an HKN Chapter, contact info@hkn.org
<input type="checkbox"/>	E	Faculty Advisor Conference Call	On-Going (times vary; approximately 3 per year)	Faculty Advisor	All advisors will be invited to participate in conference calls. Issues of concern to advisors & Chapters will be discussed. Notes/recording of the meetings will be distributed after each meeting.	email info@hkn.org with questions

<input checked="" type="checkbox"/>	Category	Name	Timing	Responsible Party	Details	Links/Contacts*
<input type="checkbox"/>	K2	Multimedia submission	On-Going**	President, Secretary, The BRIDGE Correspondent, etc.	<p>Submit pictures, videos, articles, etc., with the corresponding Chapter Activity Report to Headquarters</p> <p>The Chapter is responsible for obtaining permission from individuals in any submission</p>	<p>Send materials/inquire about a submission to THE BRIDGE via email at info@hkn.org</p> <p>The IEEE-HKN photo/video release form can be accessed here: https://drive.google.com/file/d/17H2t5dS4ka1oKZUDCLtIEPQmKyR9Vm9/view</p>
<input type="checkbox"/>	K2	Alumni Engagement	On-Going**	President and/or Vice President w/Faculty Advisor facilitation	<p>The Faculty Advisor can be a link between officers and alumni.</p> <p>Interaction with alumni, including but not limited to</p>	<p>Headquarters can help you connect with your own alumni as well as other alumni in your area</p> <p>Faculty Advisors can access the list of members and alumni for their chapter via OU Analytics (login required)</p>
<input type="checkbox"/>	K2	Student mentoring	On-Going**	President and/or Vice President	<p>Create a program in which your upper-level and graduate students can mentor younger students. This can go beyond a tutoring program/include advice about classes, career/graduate school preparation, etc.</p>	<p>Get ideas from the IEEE-HKN Faculty Advisor Handbook</p>
<input type="checkbox"/>	K2	Inter-chapter activities	On-Going**	President and/or Vice President (w/possible Faculty Advisor facilitation)	<p>Arrange activities with other IEEE-HKN Chapters (in your area and/or virtually).</p> <p>Faculty Advisors should help with logistics.</p>	<p>Find other Chapters through the University Chapters pages</p> <p>Meet others at the SLC</p> <p>Connect via your Regional Governor or Headquarters</p>
<input type="checkbox"/>	K2	Community Service	On-Going**	President and/or Vice President	<p>Chapter volunteer activities/philanthropic efforts (not inclusive of STEM outreach/ student mentoring - listed separately)</p>	<p>Get ideas from the Successful Practices Database (login required) as well as the IEEE-HKN Faculty Advisor Handbook</p>
<input type="checkbox"/>	K2	STEM outreach	On-Going**	President and/or Vice President (w/possible Faculty Advisor facilitation)	<p>Organize STEM programs for the public, local schools, etc.</p>	<p>Get ideas from the Successful Practices Database (login required) as well as the IEEE-HKN Faculty Advisor Handbook</p>

<input checked="" type="checkbox"/>	Category	Name	Timing	Responsible Party	Details	Links/Contacts*
<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	Get ideas from the Successful Practices Database (login required) as well as the IEEE-HKN Faculty Advisor Handbook
<input type="checkbox"/>	E	Providing Broad Perspective~	On-Going	Faculty Advisor	Give a broader perspective of HKN, IEEE, and industry. Provide Chapter with resources about the IEEE sections, technical groups, etc. (either directly or by connecting officers with relevant speakers)	Get ideas from the Successful Practices Database (login required) as well as the IEEE-HKN Faculty Advisor Handbook
<input type="checkbox"/>	A	Planning meeting	Beginning of each academic year (useful to hold one at the beginning of each academic term)	Chapter officers Faculty Advisor	Arrange to meet with the Chapter officers to plan activities for the coming year/term. Ensure that you and the officers have each others' contact information.	Contact IEEE-HKN Headquarters at info@hkn.org to set up a conference call if you and the officers need assistance in planning Your Regional Governor may also be of assistance in this area
<input type="checkbox"/>	A K1	Annual Chapter Activity Reports***	Deadlines: For Key Chapter - due September 30 of each year To remain an <i>active Chapter</i> - due by December 31 of each year	President w/Chapter Secretary	This is your Chapter's primary record This serves as the basis for the Outstanding Chapter Award Prepare an accurate and detailed account of Chapter activities	submit via Chapter Activity Report form on the website for more details about Chapter classifications (i.e. Key Chapter & active Chapter), please refer to Section I: Chapter Classifications at the beginning of this document
<input type="checkbox"/>	E	Vote in Board of Governors Elections	Ballots available by September 1 Voting open Oct 1 - Nov 1	The ballot is sent to the Faculty Advisor and President of each active Chapter The President oversees vote of entire Chapter Either the Faculty Advisor or the President casts the ballot on behalf of the chapter	A Chapter meeting should be held to discuss candidates/decide which candidate will get the Chapter's vote. Each Chapter has one vote. The IEEE-HKN Tellers Committee will accept the first vote cast on behalf of the Chapter if duplicate votes are submitted.	Information is made available on the Board of Governors page on IEEE-HKN's website

☑	Category	Name	Timing	Responsible Party	Details	Links/Contacts*
<p>~ 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.</p>						
<p>**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.</p>						
<input type="checkbox"/>	K2	Founders Day	October 28th of each year (activities can be held throughout the month)	Chapter officers	The annual celebration of the anniversary of the founding of HKN: This is a great opportunity to raise awareness on campus, connect with alumni or outreach in the community	Materials and activity ideas will be made available on the Founders Day page on the IEEE-HKN website prior to the month of October
<input type="checkbox"/>	A K1	Recruitment	Plan early enough in the semester so as to be ready for inductions	Chapter President w/Faculty Advisor	Faculty Advisor is generally responsible for determining academic eligibility & providing an invitation list to the Chapter President (due to privacy laws)	Full membership criteria for all levels (undergrad, grad, faculty, professional) can be found in the Operations Manual There is information for prospective members on the website Refer to the Faculty Advisor Handbook and/or the website's Chapter Operations Page for additional information
<input type="checkbox"/>	A K1	Pre-induction activities	between invitations and inductions	Chapter President or other officers	If your chapter requires prospective members to perform a service project/other activities prior to induction, ensure that it alligns with IEEE-HKN ideals and is within your university's guidelines	Consult your chapter operations manual Verify the policies of your university

☑	Category	Name	Timing	Responsible Party	Details	Links/Contacts*
<input type="checkbox"/>	A K1	Inductions	Prior to the end of the academic year/term	President w/Chapter Secretary	<p>Organize/hold an induction ceremony. All candidates must attend the Induction Ceremony to be HKN. If a candidate misses the ceremony, they should be invited to the next induction ceremony</p> <p>Ensure that new members are properly reported to Headquarters</p> <p>Faculty Advisors should attend ceremony if possible & encourage other faculty/administrators' attendance</p>	<p>Complete the induction form and submit it with payment</p> <p>A sample induction ritual script is available on the Chapter Operations page.</p> <p>Induction materials (and IEEE-HKN pins, etc.) are available in the IEEE-HKN Store.</p>
<input type="checkbox"/>	A K1	Officer Elections	Prior to the end of the academic year/term	Chapter President	<p>Officers (w/Faculty Advisor's help) should actively seek nominations</p> <p>Hold a nomination meeting & subsequent election meeting</p> <p>Report results to Headquarters in a timely manner</p>	<p>The Chapter Leadership Page has information about each officer position</p> <p>Submit the New Officer Report via vtools within a week of the election</p>
<input type="checkbox"/>	A K1	Student Leadership Conference (SLC)	Usually held in the Fall (date varies by year)	Any member & Faculty Advisor is eligible to attend	<p>Consider sending one or more officers</p> <p>This annual conference is a great opportunity for leadership training, meeting, and networking with other IEEE-HKN student members</p> <p>As appropriate, your chapter could also apply to host a future SLC</p>	<p>The SLC page of the IEEE-HKN website will have information available prior to the event each year</p>

<input checked="" type="checkbox"/>	Category	Name	Timing	Responsible Party	Details	Links/Contacts*
<input type="checkbox"/>	K2	Award Nominations	<p>Nomination Deadlines: <i>Outstanding Teacher</i> - 6 May</p> <p><i>Outstanding Student</i> - 30 June</p> <p><i>Outstanding Chapter</i> - 30 June</p>	<p><i>Outstanding Teacher</i> - nominated by the Chapter</p> <p><i>Outstanding Student</i> - can be nominated by any member in an active chapter (requires Advisor certification)</p> <p><i>Outstanding Chapter</i> - no nomination required (the Annual Chapter Report acts as the nomination)</p>	All active chapters can nominate for IEEE-HKN Awards (in particular the Alton B. Zerby and Carl T. Koerner Outstanding Student Award & the C. Holmes MacDonald Outstanding Teacher Award)	The awards page of the IEEE-HKN website will have details and nomination forms available
<input type="checkbox"/>	G	New Officer Training	Prior to the end of the academic year (and prior to the end of fall semester if your Chapter holds elections twice per year)	Outgoing & Incoming officers w/Faculty Advisor	<p>Meet to train new officers in their duties & to update contact information</p> <p>Having each officer keep detailed records of their activities/duties will help these transitions</p>	The IEEE-HKN website's Chapter Leadership Page has information on each position
<input type="checkbox"/>	G	Order graduation materials	At least 3 weeks prior to graduation	Graduating members	Recognize accomplishments with IEEE-HKN items at graduation	Order honor cords & stoles from the IEEE-HKN Store
<input type="checkbox"/>	A K1	Annual Chapter Activity Reports***	<p>Deadlines: For Key Chapter - due 30 September of each year</p> <p>To remain an <i>active Chapter</i> - due by 31 December of each year</p>	President w/Secretary	<p>Activity reports are the primary record of your chapter and serve as the basis for the Outstanding Chapter Award</p> <p>Prepare an accurate & detailed account of chapter activities</p>	Submit Chapter Activity Report forms on the IEEE-HKN website
<p>*** 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 30 September 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 31 December deadline.</p>						