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## Foreword

The contents of this handbook are the result of a compilation of information from various chapters and various brothers affiliated with the Pi Kappa Alpha International Fraternity for the use by any chapter which is interested in establishing or improving its programming.

It should be understood that each chapter is self-governing and solely responsible for its day-to-day, week-to-week and month-to-month operation and nothing herein is intended as or should be deemed as supervision, direction, monitoring, oversight or as an effort to control the local chapter by the Pi Kappa Alpha International Fraternity, which is a fraternal affiliation of over 220 chapters, over 14,000 active undergraduate members and over 220,000 alumni and several nonprofit corporations, including, but not limited to Pi Kappa Alpha Corporation, a Tennessee nonprofit corporation which serves as a clearinghouse and an administrator for purposes of organizing meetings and conventions, publishing fraternal publications and performing other functions for the entire International Fraternity.

This handbook is an educational guideline only which contains suggestions and recommendations developed by various chapters which were able to develop successful programs. It is published and available to any chapter through the clearinghouse in Memphis as a form of brotherly advice for whatever use one wants to make of it.

All ideas herein are optional and nothing is mandatory. Participation is by the voluntary choice of each chapter and each member with the understanding that one generally gets out of something what one is willing to put into it. Thus, any language contained herein which could possibly be construed as "mandatory" such as "do this" or "do that" is only in the form of a recommendation that if one wishes to get the most benefit out of using the suggestions in the handbook, then the suggestions can be utilized with the understanding that any handbook is, at most, a guide and that the users should substitute their own experience and judgment to use, adapt or modify the suggestions and recommendations contained herein. In other words, the handbook is a guide from which the users can use to establish, improve or build their own programs, using their own knowledge, common sense, ideas and experience and to assist the users from time to time as a reference for ideas and suggestions. In turn, each chapter is encouraged to share good ideas with other chapters by advising the administrative clearinghouse for possible inclusion in future publications.

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**ALUMNI ADVISING**

The Pi Kappa Alpha International Fraternity  
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# The Pi Kappa Alpha Advisor

## The Advising Concept

Whether you are currently serving as a chapter volunteer, or considering serving Pi Kappa Alpha in this valuable capacity, welcome! This handbook has been created to provide chapters and alumni with an overview of the roles of the chapter advisor and alumni advisory board. It is not an instructional manual, and cannot provide answers for every situation, but it does provide a framework for a successful advisor – chapter relationship.

While the Fraternity's Constitution and Chapter Codes do not "require" chapters to have an advisor, most chapters do have one and find the service of an effective advisor to be invaluable. The most effective advisors are also part of a team, through the formation of an alumni advisory board.

Overall, the most common characteristic of Pi Kappa Alpha's award-winning chapters – those that perennially are the most competitive on their campus – is the presence of an effective advisory team!

While experience supports the need and value of an advisor, it is not always easy to find student member acceptance for an advisor. Sometimes this is due to the misconception that an advisor is in some way a "manager" or "parent". In other cases, a chapter may simply be reluctant to consider new and challenging ideas. There is no easy remedy in these situations. Successful advisor - chapter partnerships can only be achieved after taking the time to build a relationship based on trust and mutual respect.

## The Advisor – Chapter Relationship

The Fraternity created a task force to study the issue of chapter advising. As part of their research, they evaluated many of our most successful advisor – chapter partnerships. Their research found that almost all of those relationships shared the following common characteristics.

- ◆ The advisor and the chapter are genuinely dedicated to the Fraternity's Vision, Mission and Creed; they both are committed to meeting and exceeding the Fraternity's policies and expectations.
- ◆ The advisor is a graduate with at least five years of separation from his student involvement; he is a professional and community leader; he is a mature mentor for the chapter. The chapter doesn't expect the advisor to act like a student member; the members treat him with respect.
- ◆ The advisor understands the importance of advising and mentoring, not managing or directing; he understands that failure and learning from mistakes is as important to the fraternity experience as is success and winning. The chapter is committed to success, the members understand that they are solely accountable for their actions and that failure to heed the lessons of their failures will jeopardize the advisor – chapter relationship.
- ◆ The advisor is accessible and has contact with the chapter leaders at least weekly; he is willing to reach out and partner with the Fraternity's Regional President and professional staff; he attends the annual Leadership Summit and biennial Volunteer Forum. The chapter respects the limited amount of time available from the advisor; the chapter leaders assist in the development and support of an advisory board.

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## The Alumni Advisory Board

### Role

The most effective advisors are typically part of a team. The creation and maintenance of an alumni advisory board is beneficial for the chapter and alumni volunteers. For the chapter, it offers more perspectives and expertise than one alumnus could possibly provide. For alumni, it makes advising a much more manageable and enjoyable experience.

An Alumni Advisory Board usually consists of alumni members who can offer the following:

- ◆ Their professional expertise and support to the undergraduate chapter
- ◆ A commitment to helping the chapter improve
- ◆ Counsel and advice to chapter leadership
- ◆ Assistance in the areas of academics, leadership, undergraduate recruitment and financial management
- ◆ Emphasis on the intangible aspects of fraternalism – Ritual, brotherhood, motivation, unity and caring for one another
- ◆ Up-to-date progress on new ideas, tools and fraternal programs

### Structure

Ideally, there are at least six key members of the alumni advisory board. Many times, the Chapter Advisor will chair the board, but may rotate this responsibility amongst the members. The Advisory Board shall set regular meetings strategically throughout the semester. Times of the year to target are early fall, early winter, early in the New Year, and late spring before graduation. Early in the planning process, they should also establish roles for each chairman, examples are below.

### Chapter Advisor / Advisory Board Chairman

#### *Sample Roles as Advisory Board Chairman*

- ◆ Help establish vision, mission, and expectations of the board
- ◆ Serve as a liaison to the alumni advisory board, coordinating proper communication between the advisory board and chapter executives
- ◆ Facilitate semesterly goal setting and monitor progress of board as it correlates to the Chapter Specific Strategic Plan
- ◆ Organize and lead quarterly meetings of the Advisory Board
- ◆ Communicate regularly with members of the Advisory Board via phone and email.

#### *Sample Roles as Chapter Advisor*

- ◆ Serve as a resource to the chapter president and mentor to chapter members
- ◆ Maintain regular communication with the Regional President
- ◆ Provide general assistance and guidance for chapter programs and operations
- ◆ Attend weekly chapter meetings on a regular basis (or as necessary)
- ◆ Serve as a liaison to the university, alumni association, and house corporation
- ◆ Assist in the development of the officer transition retreat
- ◆ Provide suggestions and input at executive council meetings
- ◆ Monitor chapter's progress towards becoming an *Excellence Chapter*

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## Operations Advisor

### Sample Roles

- ◆ Serve as a resource to the internal and external vice presidents
- ◆ Assist the vice presidents with management and goal setting for their respective committees
- ◆ Attend a committee meeting on a monthly basis
- ◆ Present to the chapter on management skills and best practices
- ◆ Assist in the development of the semesterly chapter goal setting retreat

## Financial Advisor

### Sample Roles

- ◆ Assist the treasurer in developing the chapter budget and financial reports
- ◆ Meet with the financial committee on a monthly basis
- ◆ Work consistently with the treasurer to improve the chapter's culture of financial accountability
- ◆ Encourage the chapter to satisfy all requirements of the university, alumni, and International Fraternity financial assessments, reports, fees and deadlines
- ◆ Present to the chapter on financial best practices
- ◆ Identify a local accountant to assist in the annual audit and filing of taxes
- ◆ Assist with the establishment and maintenance of the Chapter's endowment fund through the Educational Foundation and participation in the *phi phi k a* club

## Recruitment Advisor

### Sample Roles

- ◆ Assist the recruitment chairmen in developing the chapter's written recruitment program
- ◆ Help develop a philosophy and strategy for year-round recruitment
- ◆ Meet with the recruitment team on a monthly basis
- ◆ Assist in the development of the semesterly chapter recruitment retreat
- ◆ Provide comments and insights during the chapter recruitment retreat
- ◆ Provide alumni input and recruit alumni support for chapter recruitment activities

## Educational Advisor

### Sample Roles

- ◆ Assist the pledge educator in developing the annual review of the pledge education process
- ◆ Aid in the development of the 8-week, written pledge education program
- ◆ Assist the pledge educator to find local/campus speakers for pledge education program
- ◆ Assist the continuing educator in developing a written member education program
- ◆ Assist the continuing educator in developing a local speakers program
- ◆ Have a working knowledge of the Ritual, help facilitate Ritual execution and education

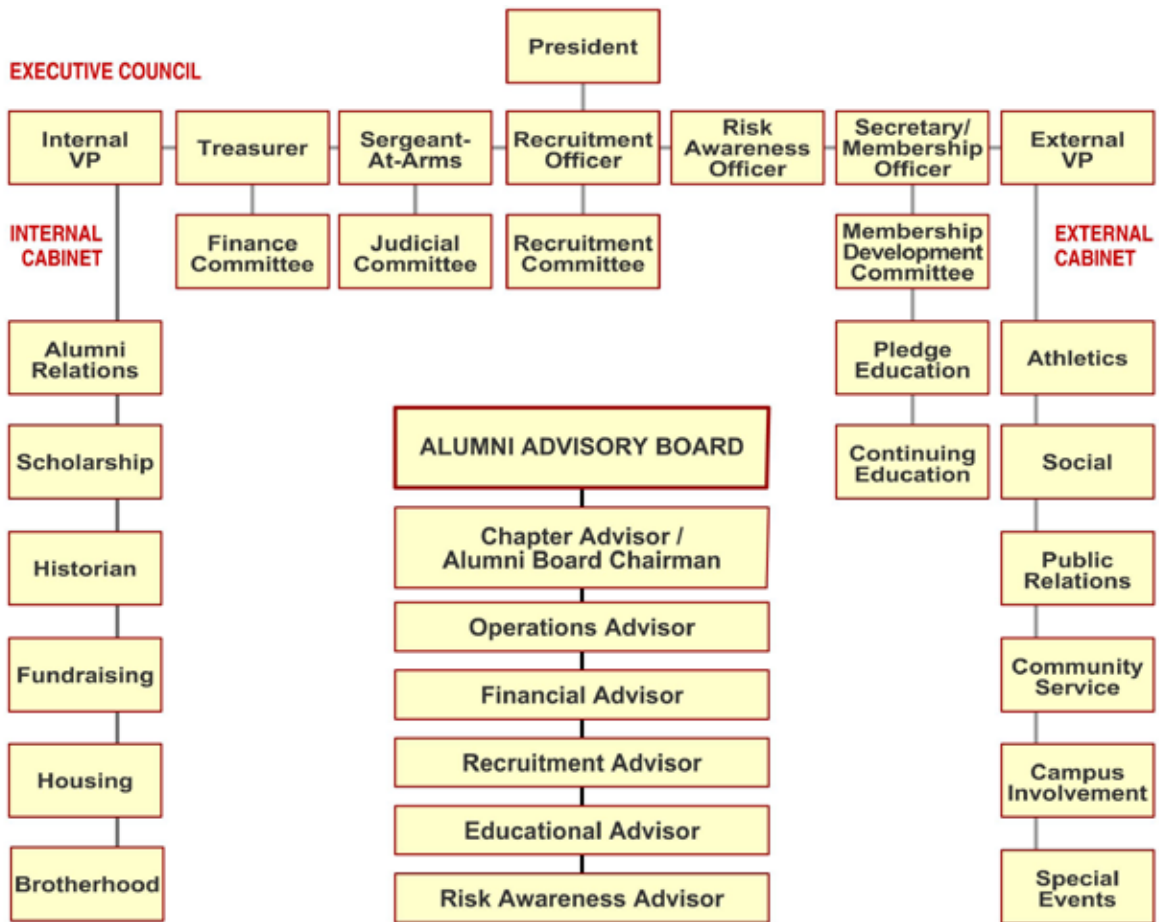
## Risk Awareness Advisor

### Sample Roles

- ◆ Help develop a crisis management plan, educate the membership on its implementation and update annually
- ◆ Assist in the presentation of the chapter's risk awareness policies and procedures
- ◆ Assist the chapter in facilitating an understanding of and signing of the Fraternity's *Standards*
- ◆ Assist in sourcing speakers to present on risk awareness issues
- ◆ Serve as a liaison to the house corporation
- ◆ Maintain a working relationship with police, fire inspectors, and health inspectors

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## Advisor - Chapter Organizational Chart



## Getting Started as a Volunteer Advisor

As a Chapter Advisor or member of the Advisory Board, organizing the advising process can often be difficult. This may be your first experience with a Pike Chapter since you were an undergraduate! The following steps have been developed to help organize your volunteer board and get up to speed as quickly as possible

1. Review this reference guide with the Regional President or chapter consultant and ask questions as necessary.
2. Establish a clear communication plan with the Regional President and chapter consultant.
3. Contact the Memorial Headquarters to update your contact information.
4. Meet with all advisory board team members to determine a meeting schedule and communication plan.
5. Meet with the chapter president to review the semester calendar, discuss chapter goals and establish a communication plan.
6. Become familiar with the resources available to advisors on [www.PIKES.org](http://www.PIKES.org) under *Alumni and Volunteers*. As you work to organize and integrate the advisory board, it is essential that you know what support and education is available.
7. Become familiar with how to find online resources available to chapter officers.
8. Make plans to attend your Pike University Leadership Summit.

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## Working with Chapters

### The Chapter Leadership Model (*Chapter Structure and Officer Roles*) and Chapter Self Assessment

The Fraternity's Chapter Leadership Model features an eight-member chapter executive council chaired by the chapter president, four executive level committees (finance, judicial, recruitment and membership development) and two cabinets (internal and external). The sample chapter structure chart on the facing page is available at [www.PIKES.org](http://www.PIKES.org) under "Chapter Services". The online structure is interactive and includes sample performance roles and goals for each officer and chairman.

The Chapter Self Assessment document is a list of questions for chapters or advisors to use in generating goals and evaluating competitiveness. The scoring summary that is included is used by the Fraternity's chapter consultants during their visits and is an indicator for the selection of Pi Kappa Alpha's International Awards.

The Chapter Leadership Model and Chapter Self Assessment documents, both available online in the Officer Resources section of the website, are valuable goal-setting and assessment tools. These documents provide chapters with a consistent way to set goals and evaluate performances. For more information, contact the Director of Services at [pkaserv@pikes.org](mailto:pkaserv@pikes.org)

### Chapter Specific Strategic Planning

The Chapter Specific Strategic Planning guide was designed to help chapters facilitate goal setting retreats and develop long and short term written goals. This document is also a great way to help the advisory team properly engage the chapter. It includes a sample agenda for a goal setting retreat, the 4-step goal setting process, and sample goals to help improve performance on the Chapter Self Assessment. This guide is available in the Officers Resource section of [www.PIKES.org](http://www.PIKES.org) or by contacting the Director of Volunteer Development at [alumni@pikes.org](mailto:alumni@pikes.org).

## Pike University

Pike University encompasses the Fraternity's leadership programs and is the foundation of Pi Kappa Alpha's education curriculum. Included are the annual Leadership Summits and the Chapter Executives Conference, and the biennial International Convention, Academy and Volunteer Forum. Pike University offers scholarships for students and alumnus member attendance at these events, with chapter president approval. More information is available by visiting [www.PikeUniversity.org](http://www.PikeUniversity.org).

### Leadership Summits

Leadership Summits are designed for every chapter member. The curriculum is focused on the basics of chapter programming and Pi Kappa Alpha's beliefs. They are designed to give a chapter member exposure to the big picture, while giving him the opportunity to make an impact on his Chapter. Chapter advisors and advisory board members are encouraged to participate with their chapters in these weekend programs.

### Chapter Executives Conference

The Chapter Executives Conference is held each January in Memphis. It is open to chapter presidents, treasurers and recruitment chairmen. The curriculum for each of the three tracks focuses on advanced leadership and management techniques.

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### **International Convention**

The International Convention is held in even-numbered years and is open to all Pi Kappa Alpha members, both undergraduates and alumni. It serves as the legislative meeting of the Fraternity and elects the Supreme Council. It typically features programming presentations as well as the International Awards.

### **The Academy**

The Academy is held in the summer of odd-numbered years and is provided for emerging chapter leaders and committee chairmen. It focuses on advanced chapter programming and operations. The International Awards are also presented at this event. Chapter advisors are welcome to participate with their chapters in this event.

### **Volunteer Forum**

The Volunteer Forum is open to chapter advisors and members of advisory boards, alumni association leaders and house corporation officers. It features programming specifically designed for alumnus volunteers. Curriculum topics include real estate management, organizing alumni events and chapter advising techniques.

## **Fraternity Policies**

All chapter officers and advisors should be familiar with the Fraternity's Constitution, Chapter Codes, The True Pike, *Standards*, and our Vision, Mission and Creed. Copies of each are available from the Memorial Headquarters or online at [www.PIKES.org](http://www.PIKES.org)

### **Constitution and Chapter Codes**

The Constitution lays forth the name, object and structure of the Fraternity, as well as rights of appeal. The Chapter Codes include information on symbols, dues and fees, membership status, and chapter and officer expectations (including scholastic performance and pledge education program length). A copy of these documents can be obtained by contacting the Memorial Headquarters.

### **Standards**

The *Standards* explain Pi Kappa Alpha's minimum risk awareness expectations, broken into five categories: (1) alcohol and drugs, (2) hazing, (3) sexual abuse, (4) fire, health and safety and (5) education. Chapters and members which fail to uphold these expectations are subject to charter suspension or member expulsion.

The *Standards* document also contains the "Chapter Statement of Position on Hazing". This document can be used by chapters to clearly communicate Pi Kappa Alpha's prohibition on hazing. Once signed, a copy should be given to each new pledge and another copy retained in the chapter's files.

### **Vision, Mission and Creed, and The True Pike**

The Vision, Mission and Creed statements of belief were unanimously adopted by delegates to the 2002 International Convention. They, along with the True Pike membership standard (adopted by the 2004 International Convention), are a contemporary restatement of the values found in Pi Kappa Alpha's Ritual. More than just words, these statements are most valuable when used to evaluate every component of chapter life, such as how prospective members are evaluated or what is expected of initiated members.

## Important Issues

The longer an advisor works with a chapter, the more likely he is to come across the issues below. The following are brief descriptions; contact your Regional President or the Fraternity's staff for more information.

### **University Relationship Statements or Recognition Requirements**

Several universities have attempted to formalize their relationships with fraternities or local chapters and/or created a list of requirements in order for chapters to be recognized. Their attempts can become problematic if they require burdensome compliance reports or infringe on a chapter's rights to operate. The best recognition programs are optional and provide valuable recognition benefits.

### **Recruitment/Expansion Restrictions**

Some universities or interfraternity councils have created policies that restrict a student's ability to join a fraternity, or restrict a fraternity's ability to colonize/expand. Pi Kappa Alpha is opposed to any such restrictions. The "Pike Recruitment Philosophy" describes the Fraternity's position on this issue. It was unanimously endorsed by the 2004 International Convention and is available at [www.PIKES.org](http://www.PIKES.org).

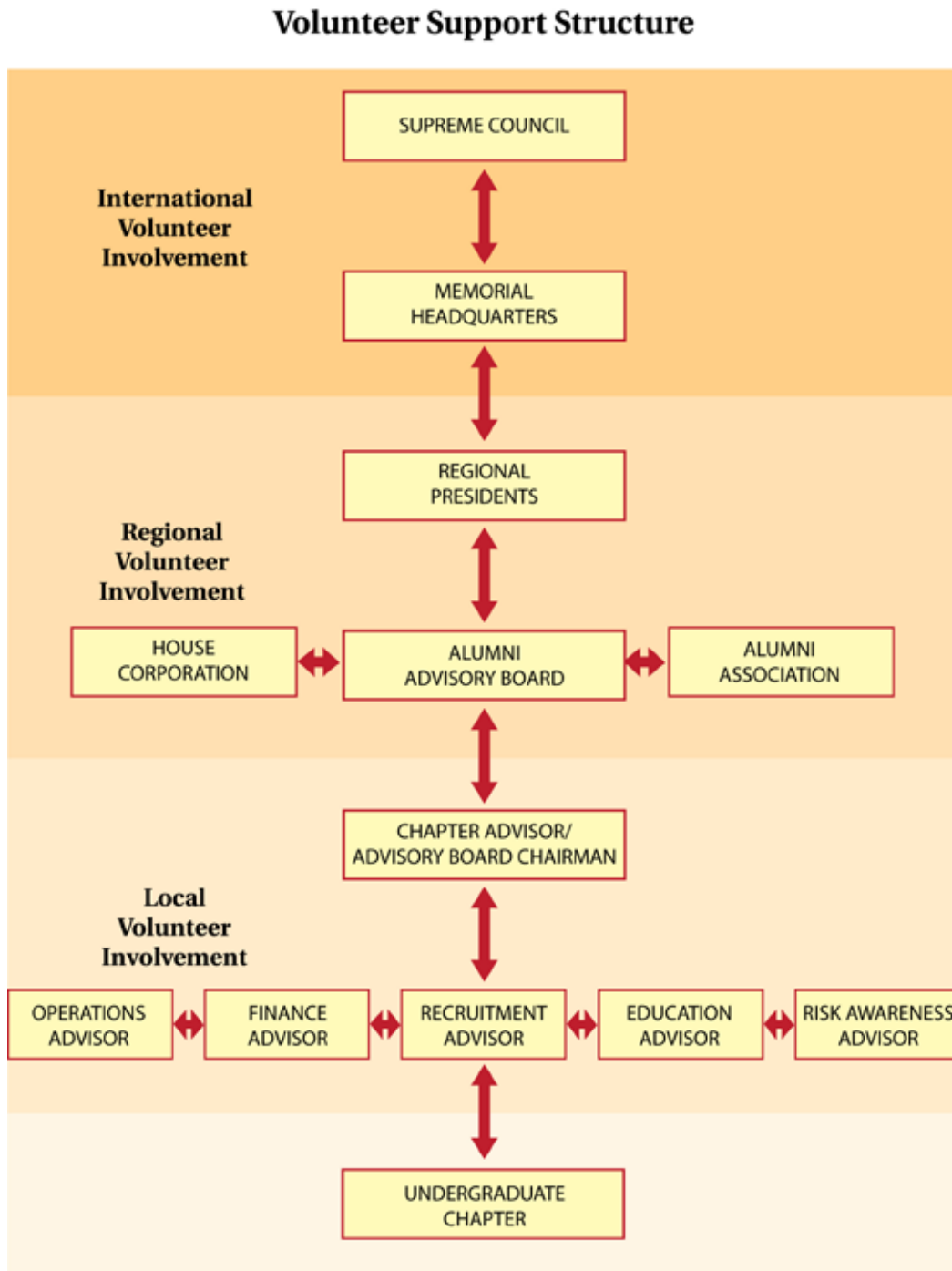
### **University or Interfraternity Council Judicial Actions**

When a chapter finds itself charged with a violation of campus or interfraternity policy, the best response is to conduct an internal investigation and then meet with the appropriate campus or interfraternity official. If the violation was committed by a member (or members) who acted without chapter approval, the chapter should utilize its internal judicial process and report that outcome to the university or interfraternity council official as well as the International Fraternity. This may prevent the chapter from being sanctioned due to the actions of individuals.

## Advising Resources

### The Volunteer Support Structure

The following chart was developed to show the different layers that are available to you, as a volunteer, for support. Please do not hesitate to use all the resources in the chart and described below as you work with the local Chapter.



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## The Regional Presidents

The Fraternity's Regional Presidents are appointed by the Supreme Council and report to the Executive Vice President or his designee. Regional Presidents volunteer to serve two-year terms. They are charged with recruiting and supporting Pi Kappa Alpha's alumnus volunteers – chapter advisors and advisory boards, house corporation officers and alumni association leaders. Regional Presidents, and their contact information, are available on the chapter/alumni association locator at [www.PIKES.org](http://www.PIKES.org).

Regional Presidents are chapter advisors' primary source for advising resources and information. They are charged to facilitate positive communication among the volunteers in the region, as a way to spread best-practices and help volunteers deal with issues. Regional Presidents will attend the annual Leadership Summit for their region, the International Convention and the Volunteer Forum.

## The Fraternity's Professional Staff

Over 30 employees work at Pi Kappa Alpha's Memorial Headquarters, focusing on areas such as the production of the *Shield & Diamond* magazine, expansion and chapter and alumni services. The following are some contacts that may be helpful to advisors. A full staff listing is available at [www.PIKES.org](http://www.PIKES.org), or you may call (901) 748-1868.

### Volunteers

If you are looking for information or support in your role as a volunteer, please contact the Director of Volunteer Development (extension 130).

### Real Estate

If you are looking for information on real estate management, loans or capital campaigns, contact the Executive Real Estate Officer (extension 122).

### Alumni Associations

Questions about starting or managing alumni associations can be answered by the Director of Development (extension 103).

### Chapters

Information on chapter programming or chapter consultant visits can be found by calling the Director of Services (extension 106).

### Pike University

Questions about Pike University events or scholarships can be answered by the Director of Education and Pike University (extension 105).

### Expansion

Information on expansion can be obtained by contacting the Director of Expansion (extension 120).

### Recruitment

Information on recruitment techniques can be obtained by contacting the Director of Growth and Marketing (extension 117).

### Chapter Finances/ Risk Awareness

Questions about chapter finances or risk awareness programming can be answered by the Finance and Insurance Officer (extension 114).

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## The University

Another source of information and support for advisors may be the university. A “Greek Advisor” is typically employed by the university and charged with supporting the chapters on a campus. Ideally, a member of the alumni advisory board should meet with the Greek Advisor each semester. It is important to try and develop a working relationship with campus officials who deal directly with the Greek Community. It is recommended that volunteers try and meet with a university official on a semesterly basis to help forge this relationship.

Some campuses have created “alumni interfraternity councils”, an informal structure that allows alumnus volunteers to work together in support of the overall Greek community. These councils may meet on a quarterly basis, and usually include house corporation officers and alumni association leaders.

## Summary

Pi Kappa Alpha is fortunate to have benefited from outstanding student and alumnus leadership throughout its history. Today, with the increased pressures and responsibilities facing our chapters, qualified alumni support is more valuable than ever!

Whether your service takes the form of helping as a chapter advisor or a part-time advisory board member, the Fraternity is grateful for your service. Advising a chapter is one of the most challenging and rewarding experiences of Fraternity membership. We hope that both you and a Pike chapter have this outstanding opportunity.

## Notes

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