

PIKE



**Advisor-Chapter
Communication Model**

Serving on an Alumni Advisory
Board

Updated February 2019

Foreword

The contents of this communication model 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 or volunteer which are interested in establishing or improving their 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 and colonies, over 14,000 active undergraduate members and over 280,000 alumni and several nonprofit corporations, including, but not limited to Oak Service 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 communication model is an educational guideline only which contains suggestions and recommendations developed by various chapters and alumni 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 communication model, then the suggestions can be utilized with the understanding that any handbook or guide 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 communication model 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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Getting started

As a volunteer, you can begin preparing for your role as advisor by going through the following steps:

1. Review this communication model and the Alumni Advisory Board Handbook to become familiar with the AAB and your specific role.
 - a. [Alumni Advisor Resources](#)
2. Spend some time becoming familiar with the chapter officer handbook on the area you are advising.
 - a. [Chapter Resources](#)
3. Establish a clear communication model with your AAB and the chapter officer you are advising.
4. Become familiar with all policies and standards of Pi Kappa Alpha. The International Fraternity and the Pi Kappa Alpha website are resources to provide training and answer questions.
 - a. www.pikes.org
5. Create your Volunteer Notebook.
6. Make plans to attend your Leadership Summit and participate in the PIKE Volunteer training track.
 - a. [PIKE University Information](#)

Chapter Advisor Election and Accreditation

The election of a new or appointment of an existing chapter advisor is encouraged every year. The Fraternity's *Chapter Codes* require a chapter's election of a chapter advisor be reported to the International Fraternity and be consented to by the appropriate regional president within ten (10) days of an election. The *Chapter Codes* also require that an advisor become accredited within thirty (30) days of an election. In summary, the advisor election and accreditation process is as follows:

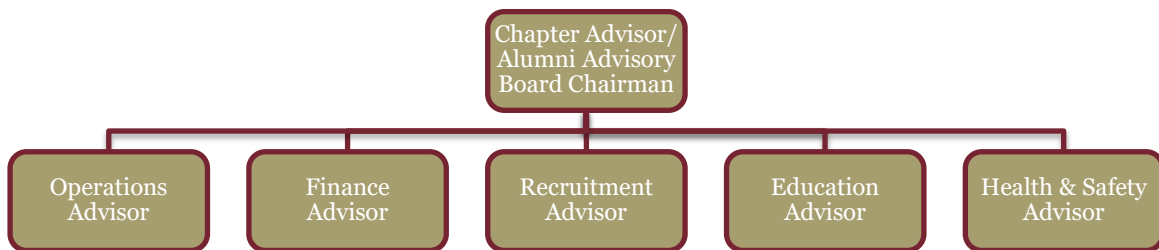
1. The chapter advisor shall be elected in a manner and serve for a term pursuant with the chapter by-laws.
2. When the chapter elects a new chapter advisor, he is to be reported to the alumni & volunteer department through the link listed below.
 - a. <https://www.pikes.org/resources/alumni-advisory-board-resources/report-a-newly-elected-chapter-advisor>
 - b. This link can be found by going to:
 - i. www.pikes.org
 - ii. Alumni & Volunteers
 - iii. Advisory Boards
 - iv. Online Forms
 - v. Report a New Chapter Advisor
3. The International Fraternity will report the chapter's election of the chapter advisor to the regional president of the region in which the chapter is located within 10 days of election.
4. The regional president will contact the chapter advisor via phone and discuss with him the basic duties and responsibilities of a chapter advisor and answer any standing questions the advisor might have.

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5. Following their conversation, the regional president will contact the alumni & volunteer department stating his consent of the chapter advisor.
6. The alumni & volunteer department will then send the chapter advisor the link to the Chapter Advisor Accreditation process which the advisor must complete within 30 days of election. The link is below.
 - a. [Advisor Accreditation](#)
 - b. This link can be found by going to:
 - i. www.pikes.org
 - ii. Alumni & Volunteers
 - iii. Advisory Boards
 - iv. Chapter Advisor Accreditation & Other Resources
 - v. Chapter Advisor Accreditation
7. Once the accreditation process is complete the chapter advisor will receive a packet from the International Fraternity that includes the following:
 - a. Alumni advising reference guide
 - b. PIKE *University* information
 - c. Chapter finance and liability protection information
 - d. The PIKE recruitment philosophy, trademark information, and policy reminders
 - e. *Standards*
 - f. *Constitution and Chapter Codes*
 - g. Volunteer bio form

Appointment of Alumni Advisory Board Members

The *ideal* alumni advisory board consists of six volunteers willing to provide their time, advice, and expertise to the undergraduate chapter.



While the chapter advisor is elected by the chapter, the board members are appointed by the board chairman. This process can be in conjunction with the chapter's executive council so they can give feedback on the potential board members to the board chairman.

Today's chapter advisor serves a dual role. Chapter advisors help advise the chapter president, and they're asked to chair the alumni advisory board. It is recommended the alumni advisory board chairman maintain, recruit and organize the board. The chapter also helps in the process of recruiting board members through name generation and alumni events.

When appointing board members it is important to take the following into account:

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1. Occupation
 - a. Manager/Director – Operations Advisor
 - b. Accountant/Banker – Finance Advisor
 - c. Sales/Marketing – Recruitment Advisor
 - d. Professor/Dean – Education Advisor
 - e. Lawyer/Insurance – Health & Safety Advisor
2. Offices held while they were in the chapter
 - a. Having experience in the positions they are advising is a plus
3. Personality
 - a. The best advisors are able and willing to connect and work with today’s college students.
4. Availability
 - a. While the time commitment is not strenuous, it is important to find advisors who are willing and able to be involved.

These are a few basic recommendations when appointing board members. There might be an individual who does not fit any of the above criteria but has the will and want to advise.

As stated above, the *ideal* alumni advisory board consists of six members. If the board chairman is unable to recruit a full six-man board, it is recommended he starts with three members and strategically builds out the rest of the board over time. There are also other advisory board positions the chapter might need/want other than the ones listed above. Do not limit the alumni advisory board just because the *ideal* model has been filled. Although advisor accreditation is only required for the chapter advisor/AAB chairman, it is recommended that all AAB members complete the online form.

The Role of the Alumni Advisory Board

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

Chapter Advisor/AAB Chairman Communication

Communication with RP

Forge a working relationship with your regional president. You should know how to contact your RP and he should be able to contact you. As chapter advisor it is your responsibility to update your RP once a semester on the status of the AAB and the chapter.

Estimated interaction: 1-2 times a semester

Communication with AAB

It is recommended that the chapter advisor/AAB chairman reach out to the rest of the AAB at least once a month. A good communication model is a key responsibility of the board chairman. Communicating once a month will ensure accountability within the board as well as help you get updates on how the board is performing with the chapter. A sample monthly communication agenda can be found on page 14 of this communication model.

Estimated interaction: 1 time per month

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Communication with Chapter President

Having a strong working relationship with the chapter president is beneficial when it comes to being an effective chapter advisor. It is recommended that you reach out to the chapter president at least once a week so you are always informed of chapter activities and accomplishments.

Estimated interaction: 1 time per week

Communication with Fraternity/Sorority Life Advisor & Dean of Students

When Greek officials were surveyed about what they expect most out of an advisor, the number one answer was good communication. Having a good relationship with the Greek advisor will have a lasting impact on the chapter. Greek advisors serve as liaisons between the chapter and the rest of the university.

Estimated interaction: 1-3 times per semester (or as needed)

Communication with Chapter Consultant

Every year the chapter you are advising will be assigned a new chapter consultant. He is the chapter's main point of contact for the year. It is a good practice to be on a first name basis and know how to contact him throughout the year. When the chapter consultant comes into town, try to schedule an hour or two to meet with him to discuss the AAB and provide updates on chapter operations.

Estimated interaction: 1 time per year (ongoing communication)

Communication with Regional President

The regional president is a regional volunteer who helps to support volunteer entities in his region. His main goal is to support you. It is best that as chapter advisor, you communicate at least twice a year with the regional president to get updates from him throughout the region and ask for any assistance you might need. Ideally, one of those interactions would be at the PIKE *University* regional leadership summit.

Estimated interaction: 2 times per year

Facilitate Goal Setting and Strategic Planning

Facilitating annual transition retreats and semesterly goal setting retreats is an opportunity for advisors to interact with the entire chapter and help them prepare for the future. The advisors work with the chapter to set goals, create the chapter calendar, and promote effective transitioning. It is recommended that advisors try to host at least two retreats per year. Sample copies of the strategic plan can be found at advisoryboard.pikes.org and sample transition materials can be found in all officer handbooks.

Estimated interaction: 2 times per year (one goal setting retreat and one transition retreat)

Operations, Recruitment, Educational, Financial, and Health & Safety Communication

Communication with Chapter Advisor/Board Chairman

As a member of the chapter's AAB it is recommended to outline a communication model with the chapter advisor/board chairman. It is recommended that you contact the chapter advisor/board chairman at least once a month. This will allow you to provide updates on the area and chapter member you are advising; discussing any important issues or topics that have surfaced for the month.

Estimated interaction: 1 time per month

Communication with Chapter Officers

It is important to know that the advisor and undergraduate communication model must be clearly defined. Communication between the advisor and advisee must go both ways and not be linear. The undergraduate should be reaching out to you as much as you are reaching out to him. Depending on the office you are advising, it is recommended that you reach out to your undergraduate counterpart twice a month.

Estimated interaction: 2 times per month

Promote Goal Setting and Strategic Planning

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Estimated interaction: 2 times a year (one goal setting and one transition)

PIKE University

Promote Attendance at PIKE University

PIKE *University* encompasses the Fraternity's leadership programs and is the foundation of Pi Kappa Alpha's educational curriculum. As an advisor, you can help to promote chapter attendance through your relationship with the chapter. For a full list of all the PIKE *University* events follow the link below:

<https://www.pikes.org/pike-u>

Estimated interaction: 3 times per year

Attend Your Regional Leadership Summit.

Up to eight leadership summits are held annually. Each summit supports 2-3 local regions. Leadership summits educate chapter volunteers through the PIKE Volunteer program on alumni advisory boards, alumni associations, and house corporations. A few of the educational sessions offered are *Volunteer and Liability Coverage*, *Coaching vs. Mentoring Advising Techniques*, and *Maintaining and Evaluating your AAB*.

Estimated interaction: 1 time per year

Chapter and AAB Development

Target Areas for Chapter Improvement

As an advisor, one of the best practices is to concentrate on one or two areas of chapter operations per semester. It is unrealistic to try and improve all areas of the chapter at one time. The best way to target specific areas to work on is to conduct a G.R.O.W. Model analysis with the chapter. A G.R.O.W. Model analysis concentrates on the goals, realities (S.W.O.T.), options, and way-forward for the chapter. This analysis can be found in the chapter strategic planning document located on <https://www.pikes.org/resources/alumni-advisory-board-resources>

Estimated interaction: 1 time per semester

Assist the chapter in completing the three phases of the Chapter Performance Checklist

To get a more detailed look at where the chapter currently stands, it is recommended the advisors work through the chapter performance checklist with the chapter at the beginning of each semester. The three phases recommend steps for every position in the chapter to form a solid foundation. The chapter performance checklist can be found in the General Resources page located at <https://www.pikes.org/resources/chapter-resources/general-resources>.

Estimated interaction: 2 times per year (during goal setting retreat)

Cultivate and Track Alumni Advisory Board Members

As an advisor, you are charged to recruit and maintain an alumni advisory board at the chapter you are advising. The ideal board consists of six alumni, as outlined in the Alumni Advising Manual, and it is your goal to have the AAB and the chapter working toward this ideal advising situation.

Alumni Advisory Board Resources

The Volunteer Notebook

It is a best practice to create a volunteer notebook when assuming a volunteer role. The volunteer notebook is designed to have all the materials an advisor would need in one location. This not only helps the advisor stay organized, but it assists in the transition from advisor to advisor. Below are recommendations of what the volunteer notebook can include.

1. Cover page with AAB mission and objectives
2. Contact information of AAB members, alumni association members, house corporation members, and chapter officers
3. Chapter roster
4. Copy of position goals and chapter goals
5. Alumni Advisory Board Handbook
6. Handbook of undergraduate position advising (ex. Finance Advisor-Treasurer Handbook)
7. Consultant Visitation Analysis
8. Chapter calendar
9. *PIKE Standards and Chapter Statement of Position on Hazing*
10. IFC by-laws

International Fraternity Resources

The International Fraternity has multiple resources available to advisors on its website.

- ◆ www.pikes.org
 - i. Alumni & Volunteers
 - ii. Advisory Boards
 - iii. Alumni and Volunteer Resources
- ◆ Once Alumni and Volunteer Resources is clicked, it contains the following:
 - Chapter Advisor Handbook
 - AAB Handbook
 - Chapter Leadership Model
 - Chapter Strategic Planning
 - Alumni Awards Application
 - Volunteer Recruitment Guidelines
 - Alumni Advisory Board Prospects Tracking Sheet
 - PIKE *U* Sample Agendas
- ◆ Contact the director of alumni engagement
 - Phone: 901-748-1868 ext. 1112
 - Email: alumni@pikes.org

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Alumni Advisory Board Sample Timeline

Below is a sample outline of basic responsibilities for advisors labeled as weekly, monthly, semesterly, and annual tasks. Use this guide to build your own calendar at the beginning of each semester.

Alumni Advisory Board Chairman

1. Communicate with board members via phone or email-monthly
2. Send recap of monthly communication of AAB-monthly
3. Target alumni for board vacancies-monthly
4. Organize and lead quarterly meetings with AAB-quarterly
5. Facilitate goal setting of AAB-semesterly
6. Create a rotation schedule for AAB members to attend chapter/executive meetings-semesterly

Chapter Advisor

1. Communicate with chapter president-weekly
2. Review position goals-monthly
3. Call regional president-semesterly
4. Assist in officer transitions-semesterly
5. Facilitate chapter goal setting-semesterly
6. Meet with Fraternity & Sorority Life Advisor-semesterly
7. Meet with chapter consultant-annually

Operations Advisor

1. Communicate with vice presidents-bi-weekly
2. Attend vice president committee meetings-monthly
3. Communicate with AAB chairman-monthly
4. Review of position goals-monthly
5. Assist vice presidents with goal setting-semesterly
6. Assist in officer transition-semesterly
7. Present to chapter on management skills and best practices-annually

Recruitment Advisor

1. Communicate with recruitment chairman and recruitment team-bi-weekly
2. Communicate with AAB chairman-monthly
3. Help create a recruitment action plan with the recruitment team-semesterly
4. Facilitate a recruitment retreat-semesterly
5. Promote alumni attendance at recruitment events-semesterly

Educational Advisor

1. Communicate with membership development VP-bi-weekly
2. Communicate with AAB chairman-monthly
3. Assist the membership development VP in developing the annual review of the TPE member development program-semesterly/annually
4. Assist in the planning, preparing, and execution of the TPE member development program
5. Aid in the development of the 4-week new member education, and written TPE educational curriculum-semesterly

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6. Ensure all education material has been budgeted for, requested, and ordered-semesterly
7. Ensure new members are reported to the International Fraternity (via chapter's OmegaFi *Vault* account) within 7 days following the new member pinning ceremony-semesterly
8. Ensure candidates are reported to the International Fraternity (via chapter's OmegaFi *Vault* account) no later than 5 days prior to the initiation ceremony-semesterly
9. Have a working knowledge of the *Ritual*; help facilitate *Ritual* execution and education-annually
10. Ensure a successful transition has been executed by the outgoing and incoming membership development VP's-annually

Financial Advisor

1. Communicate with chapter treasurer-bi-weekly
2. Communicate with AAB chairman-monthly
3. Assist chapter treasurer in developing chapter budget-semesterly
4. Review the financial contracts that are distributed to the members-semesterly
5. Ensure chapter pays *Liability Protection Program*
 - a. September 1st
 - i. Chapter size < 60: \$3,000
 - ii. Chapter size 60 – 90: \$3,500
 - iii. Chapter size 90+: \$4,000
 - iv. *Housed chapters: +\$1,000
 - b. January 1st
 - i. Chapter will be billed the same amount on January 1st as they were on September 1st
6. Ensure chapter pays the Chapter Assessment
 - a. October 1st – \$1,500.00 (+\$28.75 per initiate)
 - b. February 1st – \$1,500.00 (+\$28.75 per initiate)
7. Ensure chapter pays the one-time Initiation Fee
 - a. \$290 per new initiate 5 days prior to the scheduled initiation date
8. Ensure chapter pays all university fees
 - a. IFC dues, room rentals etc....
9. Work with chapter treasurer to become familiar with OmegaFi *Vault*-annually
10. Identify local accountant to audit and file taxes-annually
11. Present to chapter on financial best practices-annually
12. Promote chapter being 100% involved in the *phi phi k a* Club-annually

Health & Safety Advisor-Health & Safety Officer

1. Communicate with health & safety chairman-bi-weekly
2. Communicate with AAB chairman-monthly
3. Assist the chapter in creating a crisis management plan and educate the membership on its implementation-semesterly
4. Help develop a chapter health & safety program-semesterly
5. Assist in finding speakers for risk related education-semesterly
6. Forge a good relationship with campus police, fire inspectors, and health inspectors-semesterly
7. Present to chapter on health and safety policies and procedures-annually

Health & Safety Advisor-Sergeant-At-Arms

1. Communicate with sergeant-at-arms-bi-weekly

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2. Communicate with AAB chairman-monthly
3. Assist in review and revision of chapter by-laws-semesterly
4. Assist the judicial board in creating a due process and judicial policy-semesterly
5. Educate and promote the importance of chapter accountability-semesterly
6. Ensure the chapter signs the Fraternity *Standards and Chapter Statement of Position on Hazing*-annually

Sample Meeting Agendas

When communicating with the alumni advisory board or the chapter member you are advising, it is important to set expectations of the conversation and provide an agenda. This will help to keep you on track and progress through set goals. Below you will find a handful of agenda templates that can help you with your volunteer communications.

AAB Launch Meeting

- Assess needs of the chapter
- Assign positions
- Title, role, goal
- Create mission & objectives of board
- Set communication structure & goals
- Goal of board, individual goals
- Introduce AAB to chapter

Quarterly Face-to-Face AAB Meetings

- Review AAB & chapter goals/strategic priorities
- Progress report from each AAB member (around the horn)
- Progress report from chapter members (around the horn)
- Assess any redirection needed based on progress reports
- Any large campus issues (university, fraternity & sorority life, campus recruitment)
- House corporation & alumni association updates (invite representative from each to attend)
- Next meeting date & time

Monthly AAB Communications

(Agenda comparable to quarterly face-to-face)

- Review of goals/strategic priorities
- Each member gives an update
- Resolutions/progress on specific problems since last call
- Goals & tasks to be completed before next call

Bi-weekly Communication with Chapter Officer You Advise

For this call to be relevant, it is important that communication expectations are agreed upon by both the advisor and chapter member (i.e. Advisor calls chairman at 8:00pm on Wednesdays). It is also important to discuss who will develop agenda and lead call (i.e. Chairman designs conversation and leads with questions or topics he would like to discuss).

- Review of goals/strategic priorities
- Address progress towards completion of semesterly goals
- General planning updates
- Advisor question: 'Are you delegating and utilizing your committees?'
- Review of action plan moving forward
- Any budget needs that need to be addresses

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