



EFFECTIVE REMOTE ADVISING IN 2020

Why Remote Advising?

The historical advising model has been to have a team of local advisors to support the local chapter. As the world continues to congregate in large population centers, there are fewer and fewer alumni who are local to support the chapter. This is especially true in traditional college towns where people come to school, get their degree, then chase opportunities in other cities. Our chapters still need consistent advisory support. This is where the need for remote advising techniques and strategies emerge.

As many companies adopt the work from home model, and population centers continue to grow, the International Fraternity aims to support our volunteers no matter where they are in the world. With technology evolving, the traditional model of advising is able to change along with it. While there will be changes to the medium and methodology of advising, several core aspects of advising will need to stay the same in order for the advisor and the advisory board to be effective. No matter the advising model, the goal is the same: to provide the *best advisory support possible* to our undergraduate members.

In this, we will explore the tools our advisors use to advise without always being in the same location. The baseline communication model that we recommend for our advisors is the following:

1. Bi-weekly communication between advisor and the counterpart on the executive board
2. One alumni advisory board meeting each month
3. Attend chapter once a month
4. One goal setting retreat each semester

What's the same?

While some things will change with remote advising, many of the concepts of effective advising will stay the same:

Communication – first and foremost the expectation of bi-weekly communication will stay the same. During the early part of beginning to advise remotely, it is recommended that the advisor and the undergraduate leader communicate once a week. It is imperative as a remote advisor to be consistent with your communication. Setting up recurring call or video times, as opposed to scheduling as you go, is one of the most effective ways to accomplish this.

Expectations – the expectations of a Pi Kappa Alpha advisor are to be active and engaged with the chapter, the undergraduate leader you advise, and to the men on the advisory board. Those expectations do not change, and, if anything, only become more important as you advise remotely.

Face-to-Face Interaction – while the whole point of remote advising is to be able to live miles away from the institution and still advise the chapter, there is still some need for face-to-face interaction to build rapport. It is recommended that the advisor try to meet with their undergraduate leader at least once during his term and preferably twice.

Goal Setting Retreats – goal setting and transition retreats are one of the most important aspects to Fraternity operations and one of the most overlooked exercises. As a remote advisor, please try to do all you can to attend the goal setting retreat in person. Scheduling the retreat around a big weekend on campus (Homecoming, alumni weekend, move-in day, etc.) will give people more of a reason to attend.



What's different?

One of the biggest changes will be the medium of communication and the understanding and patience needed:

Medium – the obvious difference is that meetings will take place over the phone or via webcam as opposed to in-person. While this can take an adjustment, there are several great pieces of software and web platforms that can make it easier. It is recommended to sit down at least once per month using a webcam as that, if the technology is working, can be one of the most effective ways to communicate.

Patience – while advising in any situation will take patience, doing it remotely will likely only increase the amount needed due to the distance, technology disruptions, and lack of face-to-face rapport.

Over-communication – one of the best practices from successful remote advisory boards is to **over-communicate everything**. Items and points of discussions that might be said in passing or in person might fall through the cracks in a remote set-up. Be sure to CC all advisors on e-mails, have follow-up e-mails after calls, and utilize conference calls to discuss with a larger audience.

Management – with members of the board being primarily remote, the chapter advisor or AAB chairman will need to take a more active role in managing the board-chapter relationship and engagement, scheduling calls, etc.

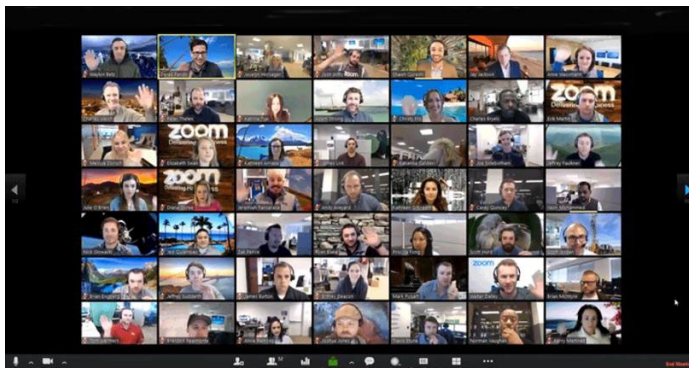
Remote Advising Resources

Communication

There are several vendors that provide platforms and services that may be of use:

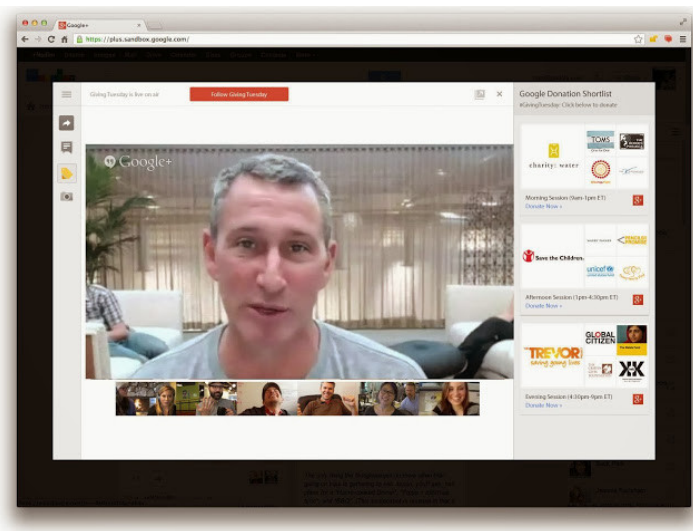


Zoom is a great virtual meeting company that offers free video conferencing for up to 100 people, for a limit of up to 40 minutes, while using the free version. Zoom provides a high-performance platform while being easy to use. We recommend this for short calls with an advisor to the chapter counterpart conversation. For example, a recruitment advisor could use Zoom to check in with the recruitment committee the night before a recruitment event to ensure they are ready for their event.





Google Hangouts provides one of the easiest, most intuitive free video conferencing capabilities of any platform on the web. A video tutorial is available [here](#). Hangouts also allows for document sharing and screen sharing, which can be used for collaborating on documents, viewing web pages, etc. The only requirement is that users have a Google account.



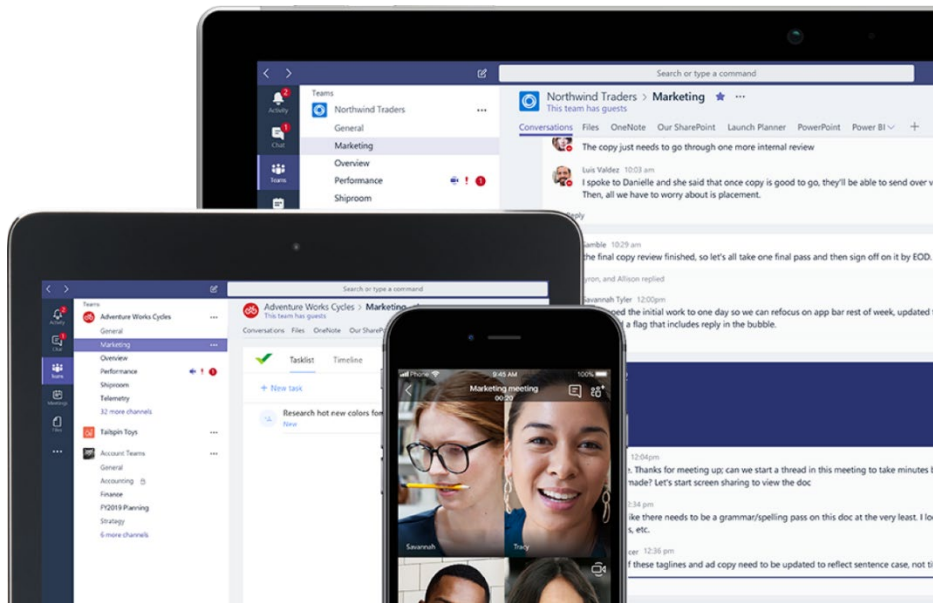
Facetime is for Apple users only but can be a great platform to host calls. Facetime is capable of hosting up to 32 people in a single call and is easily accessed using an iPhone, iPad, or Mac. This can be a great way to hold remote meetings while taking into account busy and on-the-go professionals. For example, a chapter advisor who is living over an hour from the school could use Facetime to host bi-weekly communication with the chapter president.



The above is intended to provide the chapter with general information and suggestions for improvement. It is not a directive and is not intended to direct the chapter in any manner. A chapter is not required to use or implement this information or suggestions. The decision on whether or how to use this information is solely that of the chapter.



Microsoft Teams is Microsoft's version of an all-in-one virtual communication software. In the desktop or web app, they have incorporated user-friendly functions such as chats, calls, and files. Chat is for direct messaging. Teams is the primary interactive space for conversations. Calls are, of course, where you connect for video calls, audio calls, and screensharing. This can be used as a way to ensure that long-term and day-to-day operations are on track. A user can create a Microsoft Teams account for free if they already have a Microsoft account (Outlook). With this free account, they can invite up to 299 more people to join, as long as everyone has a Microsoft account.



Additionally, if someone on your board has access to a conference line, this can also be a great way to set up bi-weekly calls with the executive and alumni advisory board. To ensure that everyone is on the same page about when bi-weekly communication is going to take place, we recommend filling out the [Advisor-Officer Communication Contract](#) (below). This communication plan will help set the expectation on the front end. These conversations can be had via phone, in-person, or over one of the outlined platforms above.



PIKE Volunteer



PIKE Volunteer

UNDERGRADUATE AND ADVISOR COMMUNICATION PLAN

Advisor Name: _____

Advisor Phone: _____ Advisor e-mail: _____

Undergraduate Name: _____

Undergraduate Phone: _____ Undergraduate e-mail: _____

Communication Plan

The goal of this section is to develop a *recurring* communication schedule for both parties to create a consistent line of communication between the chapter and alumni.

Frequency of communication

- Weekly Communication
- Bi-Weekly Communication

o Communication dates: _____

Type of communication

- Email _____ per semester
- Phone call _____ per semester
- In person meeting _____ per semester

Execution

The execution of this model is dependent on all parties taking responsibility to proactively communicate with each other. This communication should be focused on problem solving and creating transparency between the undergraduate members and the alumnus advisors.

It is recommended that calendar invites be set for the entire semester as early as possible so that all parties can budget time for their calls. Additionally, each person should report back to their respective boards (executive board and alumni advisory board) with pertinent updates from each meeting.

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