

PIKE



Pi Kappa Alpha
Chapter Leadership Model

*A Reference Guide for a
Chapter's Structural Overview*

Updated October 2017

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 200 chapters, over 10,000 active undergraduate members and over 200,000 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.

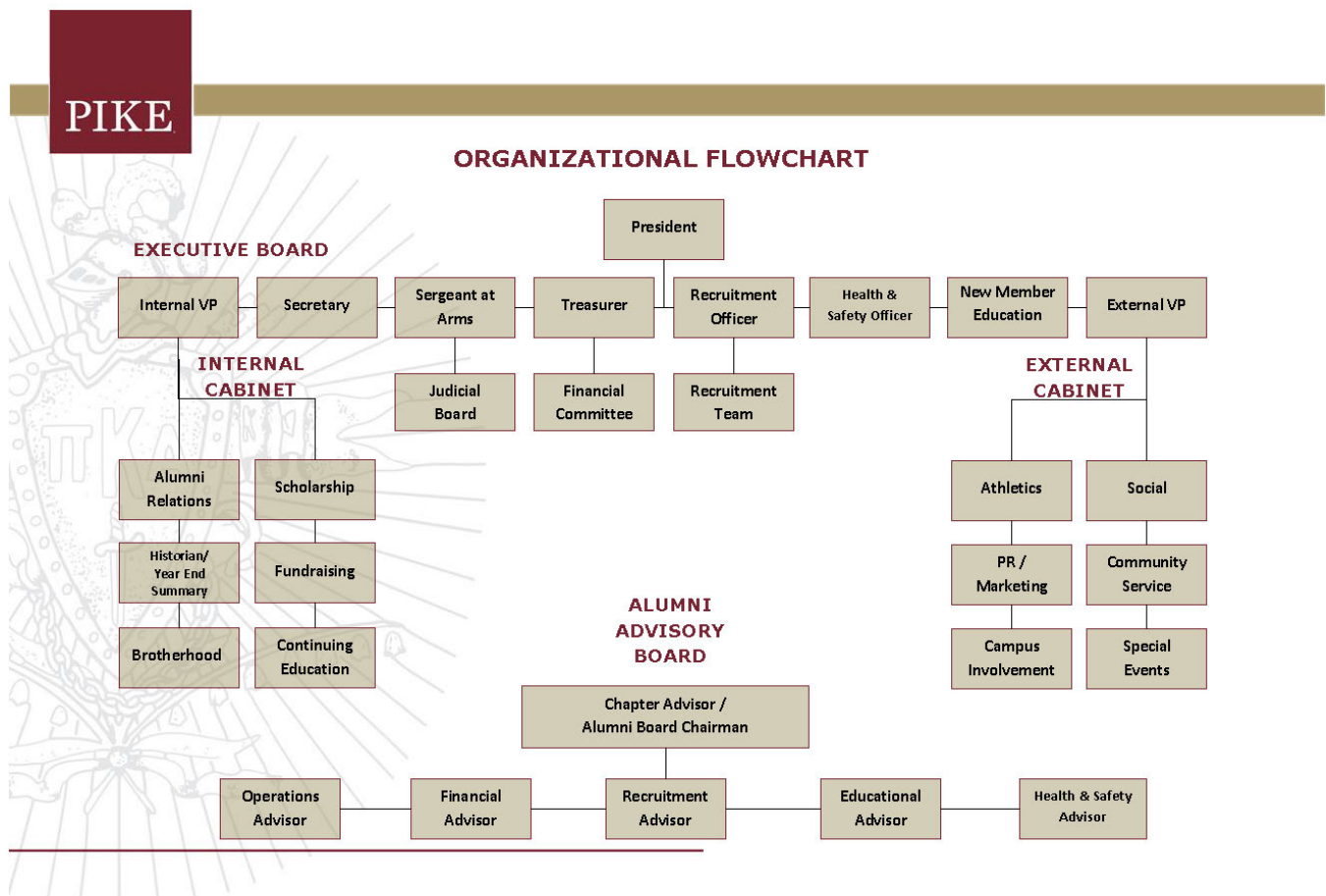
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Program Overview

The following pages contain descriptions of typical chapter officer and chairman roles. This resource should be helpful to chapters as they conduct transition retreats and educate new officers and chairmen on their respective roles.

More information is available on the Fraternity’s website, www.PIKES.org, or by contacting your [Chapter Consultant](#) at the Memorial Headquarters, 901.748.1868.



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The Executive Council

Chapter leadership is typically vested in the executive council, let by the chapter president. The executive council is composed of the president, one or two vice presidents, the treasurer, sergeant-at-arms, recruitment officer, risk awareness officer and secretary/membership officer. Executive council meetings typically occur weekly with an agenda as follows:

- ◆ President's report
 - ◆ Review of overall goal progress and chapter Strategic Plan
 - ◆ Areas of pride and concern
- ◆ Vice Presidents' reports
 - ◆ Internal committee reports
 - ◆ External committee reports
- ◆ Financial report
 - ◆ Profit and loss report / income statement
 - ◆ Balance sheet
 - ◆ Cash flow analysis
- ◆ Recruitment report
 - ◆ Work of the recruitment committee
 - ◆ Progress towards goals
 - ◆ Upcoming plans
- ◆ Sergeant-at-arms report
 - ◆ Judicial board resolutions (if any)
- ◆ Review of upcoming events
 - ◆ Details of the event
 - ◆ Risk awareness considerations
- ◆ Development of chapter meeting agenda

President

- Role:** As the chief executive of the chapter, the president will spend most of his time and energies working toward accomplishing the chapter's strategic goals. He will also serve as the primary chapter representative to the chapter's alumni advisory board and university student affairs personnel.
- Selection:** Chapter presidents are elected.
- Qualifications:** Presidents are typically upperclassmen who have demonstrated success in other prominent chapter roles (e.g. rush chairman, treasurer or vice president).
- Sample Tactics:** The president will typically lead the chapter in the annual goal setting retreat and in a biannual officer/chairman transition retreat. He will usually chair a weekly executive council meeting.
- Term:** Presidents usually serve a one semester term.

Vice President – Internal & External

- Role:** The internal/external vice president is usually charged with guiding the internal/external cabinet and committee chairmen.
- Selection:** Vice presidents are elected.
- Qualifications:** Vice presidential candidates typically will have held prominent committee chairmen roles (e.g. risk awareness, social or pledge education).
- Sample Tactics:** Bi-weekly cabinet meetings are typically chaired by the vice presidents, during which progress towards goals is evaluated from each committee chairman and financial reports are reviewed.
- Term:** Vice presidents will typically serve one semester terms.

Treasurer (and Finance Committee)

- Role:** The treasurer is the chief financial officer of the chapter and is usually responsible for the overall financial health and stability of the chapter, allocating the resources

necessary to accomplish the organization's goals. In addition to being a member of the executive council, he will chair the chapter's finance committee. The treasurer is also in charge of paying all assessments to the International Fraternity.

Selection: Treasurers are elected; members of the finance committee are typically appointed by the treasurer or executive council.

Qualifications: Treasurer candidates will typically have served at least one year as a member of the chapter's finance committee. He will also typically have a good understanding of finance and/or accounting, and is usually majoring in a business-related field.

Sample Tactics: The treasurer will usually provide the chapter, on a monthly basis, three financial reports: a balance sheet, a profit and loss (a.k.a. income) statement, and a cash flow analysis. These are usually distributed to every member and discussed during chapter meetings. The treasurer chairs the finance committee, which usually contains three other members with duties such as:

Receivables Chairman – Discusses financial obligations with all prospective members; collects membership contracts and, with the house manager, collects all housing contracts; coordinates collection efforts with third-party service providers (e.g. university billing department or companies such as Omega Financial, Inc.) if applicable.

Payable Chairman – Balances the chapter's checkbook; ensures that all checks require dual signatures (typically president and treasurer); reimburses committee chairmen for approved expenses.

Reports Chairman – Develops and distributes the monthly financial reports to members, officers and committee chairmen.

The treasurer, assisted by the finance committee, typically leads the chapter in the development of its budget. That process usually includes the following steps:

1. Completion of chapter goal setting retreat.
2. Solicitation of budget requests from officers and chairmen.
3. Development of draft budgets (separate budgets for operations, housing and kitchen), taking into account the priorities established during the goal setting retreat.
4. Presentation of draft budgets to the executive council for discussion and revision if necessary.
5. Presentation of draft budgets to the chapter for ratification, emphasizing consistency with goal setting retreat.

Term: The Fraternity's *Chapter Codes* state that all treasurers serve one-year terms. These terms are typically from January through December.

Sergeant-at-Arms (and Judicial Board)

Role: The sergeant-at-arms typically chairs the chapter's judicial board and serves an important role during the use of the Fraternity's Ritual.

- Selection:** The sergeant-at-arms is typically elected; the members of the judicial board are usually appointed by the president or executive council.
- Qualifications:** As a member of the executive council, the sergeant-at-arms will usually have demonstrated leadership ability by holding other chapter chairmanships.
- Sample Tactics:** The sergeant-at-arms will chair the meetings of the judicial board as necessary. The judicial board typically has the authority to censure, suspend or fine members for their failure to uphold chapter policies or expectations. The board could also recommend the expulsion of a member, which would require a chapter vote. The decisions of the judicial board are typically subject to review and/or modification by the executive council. The judicial board typically has at least four members, not including the sergeant-at-arms.
- Term:** The sergeant-at-arms usually serves a one semester term.

Recruitment Officer (or “Rush Chair”)

- Role:** The recruitment officer is generally charged with recruiting new members and coordinating the work of the recruitment committee (or rush captains) on an active and year-round basis.
- Selection:** The recruitment officer should be appointed by the president or executive council.
- Qualifications:** Recruitment officers have usually served at least one year on the recruitment committee or have already served as a member of the executive council. They are highly organized and have an excellent understanding of rush tactics and the campus “marketplace”.
- Sample Tactics:** The recruitment officer will typically chair a weekly meeting of the recruitment committee; organize all recruitment events; maintain the chapter’s list of prospects (green book); appoint members to the recruitment committee and lead the committee and chapter in a biannual rush retreat.
- Term:** The recruitment officer is a one semester term.

Health & Safety Officer (or “Health & Safety Chairman”)

- Role:** The risk awareness officer is typically charged with identifying risks and threats to members, guests and the overall chapter; while educating members about these risks and assisting the chapter in reducing its exposure to threats.
- Selection:** The risk awareness officer should be appointed by the president or executive council.

- Qualifications:** A good risk awareness officer candidate will typically be an experienced and respected member of the chapter.
- Sample Tactics:** Usual duties include semesterly education and enforcement of the Fraternity's *Standards* and other applicable risk awareness policies, presentation of the Fraternity's *Statement of Position on Hazing* to each pledge, review of all chapter events for compliance with the chapter's risk awareness plan, review of chapter house safety needs (usually through coordination with the house manager) and maintenance and refinement of the chapter's crisis management plan.
- Term:** Most risk awareness officers serve a one semester term.

Secretary (or "Secretary/Membership Officer")

- Role:** The secretary is usually responsible for maintaining the chapter's roster and bylaws. The secretary is expected to report new members, initiations, and alumnus status to the Fraternity through the chapter's Dashboard application at www.PIKES.org. The secretary will also submit Chapter Notes to the *Shield & Diamond* by the appropriate deadlines.
- Selection:** The secretary is usually elected.
- Qualifications:** A candidate for secretary will have typically held a committee chairmanship. This position can be a good "stepping stone" for those aspiring to hold higher chapter office.
- Sample Tactics:** Usual duties include keeping attendance and minutes at executive and chapter meetings, maintaining the chapter's bylaws and ensuring that proper procedures are followed for chapter elections and membership expulsions. In some situations, the secretary will chair the 'membership development committee' and guide their programming.
- Term:** Secretaries are typically elected to a one semester term.

Membership Education

New Member Educator

- Role:** The new member educator is charged with being a teacher for the new members of the Fraternity. The new member educator is typically the main liaison between the chapter and the new member class. As new member educator, you will educate the new members' subjects involving the Fraternity history, the *True Pike* values, and guide them through a recommended new member program of 8 weeks

or less. The new member educator needs to stay true to what is right if members of the chapter try to influence how you educate the new members. Most importantly, the new member educator must enforce the Fraternity *Standards* related to hazing and enforce a zero tolerance policy towards hazing during the new member program.

- Selection:** The new member educator should be appointed by the president or executive council.
- Qualifications:** The new member educator should be an experienced and respected member of the chapter.
- Sample Tactics:** The new member educator will organize a program that is eight weeks or less and create a new member handbook. The new member educator needs to have consistent communication with the new members, members of the chapter, and be able to motivate the chapter to adapt a positive environment with the new member program. The new member educator will oversee the new member's weekly meetings, their elections, and organize the new member retreat mid-way through the program. They will also organize an effective big brother program for the new members and the chapter.
- Term:** The new member educator usually serves a one semester term.

Continuing Educator

- Role:** The continuing educator is charged with developing a program that focuses on the education and development of their members after initiation. These areas of education and development can be organized through various speakers and events. Topics could focus on finances, professionalism, health, gentlemen, and fraternity.
- Selection:** The continuing educator should be appointed by the president or executive council.
- Qualifications:** The continuing educator should be an experienced and respected member of the chapter.
- Sample Tactics:** The continuing educator should facilitate chapter speakers at least once a month and write event summaries for every speaker. The continuing educator should identify the speakers and events to the needs of their chapter members.
- Term:** The continuing educator usually serves a one semester term.

The Internal Cabinet

The internal cabinet is typically led by the internal vice president. It is typical for the vice president to lead a weekly or bi-weekly cabinet meeting to maintain communication among the committees and encourage progress toward overall goals.

Alumni Relations

Sample Goals

- ◆ Bi-weekly communication with alumni
- ◆ Host regular alumni events
- ◆ Offer opportunities for chapter and alumni interaction

Sample Tactics

- ◆ Alumni newsletters (chapter or third-party produced)
- ◆ Golf tournaments or homecoming receptions
- ◆ Organize an alumni advisory board with chapter advisor

Scholarship

Sample Goals

- ◆ Encourage scholastic achievement
- ◆ Improve the chapter's overall grade point average
- ◆ Rank above the all-fraternity GPA average

Sample Tactics

- ◆ Academic mentors with senior members
- ◆ Scholarship competitions and awards
- ◆ Offer resources and advisement through university

Historian

Sample Goals

- ◆ Uncover and protect records of the chapter's history
- ◆ Record contemporary activities for historical archives

Sample Tactics

- ◆ Chapter history archive
- ◆ History display case

Fundraising

Sample Goals

- ◆ Raise funds for a special project
- ◆ Raise funds for a chapter house savings account

Sample Tactics

- ◆ Car washes
- ◆ Basketball tournaments
- ◆ Work at sporting venue of professional team, minor league team, or university team

House Manager

Sample Goal

- ◆ Improve/maintain the condition of the chapter house

Sample Tactics

- ◆ Live-in housing contracts
- ◆ Cleaning schedules
- ◆ Market rental rates
- ◆ “Brother of the Month/Week” awards

Brotherhood

Sample Goals

- ◆ Improve intra-chapter communication
- ◆ Develop a “Big Brother” program

Sample Tactics

- ◆ Brotherhood retreats
- ◆ Intra-chapter athletic events

The External Cabinet

The external cabinet is typically led by the external vice president. As with the internal cabinet, it is typical for the vice president to lead a weekly or bi-weekly cabinet meeting to maintain communication among the committees and encourage progress toward overall goals.

Athletics

Sample Goals

- ◆ Win the all-campus intramural trophy
- ◆ Win the all-fraternity intramural trophy

Sample Tactics

- ◆ Recruit athletes for teams
- ◆ Schedule practices
- ◆ Promote athletic events/opportunities

Social

Sample Goals

- ◆ Become the socially preferred fraternity on campus
- ◆ Host fun, safe and unique social events

Sample Tactics

- ◆ Poll members for event ideas
- ◆ Contact sororities to market social opportunities
- ◆ Plan the chapter’s social calendar

Public Relations

Sample Goal

- ◆ Promote a positive chapter image to external constituents

Sample Tactics

- ◆ Press releases
- ◆ Written PR program
- ◆ Thank you notes
- ◆ Maintain professional website

Community Service

Sample Goal

- ◆ Increase chapter community service participation

Sample Tactics

- ◆ Host a signature Pike event on campus and in the community
- ◆ Host a signature Pike philanthropy event on campus and in the community

Campus Involvement

Sample Goals

- ◆ Increase member participation and leadership in campus organizations
- ◆ Increase chapter representation in prestigious campus organizations

Sample Tactics

- ◆ Educate chapter members on campus organizations (speakers, profiles, etc.)
- ◆ Recruit members to join campus organizations
- ◆ Encourage chapter participation in campus elections

Special Events

Sample Goals

- ◆ Host a campus speaker
- ◆ Plan a Founders Day event
- ◆ Host a Parents Weekend

Sample Tactics

- ◆ Organize special events committee
- ◆ Coordinate funding with fundraising committee

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 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*

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.

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

Health & Safety 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 health and safety policies and procedures
- ◆ Assist the chapter in facilitating an understanding of and signing of the Fraternity's *Standards*
- ◆ Assist in resourcing speakers to present on health and safety issues
- ◆ Serve as a liaison to the house corporation
- ◆ Maintain a working relationship with police, fire inspectors, and health inspectors

CHAPTER LEADERSHIP MODEL

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