



# PI KAPPA ALPHA

## BUILDING AN EFFECTIVE ALUMNI ASSOCIATION

UPDATED MARCH 2024

---

## **TABLE OF CONTENTS**

<b>Forward.....</b>	<b>3</b>
<b>Development Guide and Checklist.....</b>	<b>4</b>
<b>Organizational Chart.....</b>	<b>6</b>
<b>Roles and Responsibilities.....</b>	<b>7</b>
<b>Sample Contact Sheet.....</b>	<b>9</b>
<b>Sample Meeting Agenda.....</b>	<b>9</b>
<b>Communication Structure Guideline.....</b>	<b>10</b>
<b>FAQ.....</b>	<b>11</b>
<b>Digital Media &amp; Marketing Support.....</b>	<b>13</b>
<b>Solicitation of Membership Policy.....</b>	<b>14</b>
<b>Alumni Department Contact Page.....</b>	<b>14</b>
<b>Closing.....</b>	<b>15</b>

## Foreword

The insights encapsulated in this volunteer resource have been gathered from diverse chapters and dedicated brothers associated with the Pi Kappa Alpha International Fraternity. It is intended for the benefit of any alumni entity or volunteer interested in initiating or enhancing their programming.

It is imperative to acknowledge that each alumni entity operates autonomously and bears exclusive responsibility for its day-to-day, week-to-week, and month-to-month functions. Nothing presented here should be misconstrued as supervision, direction, monitoring, oversight, or an attempt to control local entities by the Pi Kappa Alpha International Fraternity. The International Fraternity, with over 200 chapters and provisional chapters, boasts a fraternal affiliation encompassing more than 15,000 active undergraduate members, over 320,000 alumni, and several nonprofit corporations, including Oak Service Corporation—a Tennessee nonprofit facilitating meetings, conventions, publications, and other functions for the entire fraternity.

This communication model serves as an educational guideline, offering suggestions and recommendations derived from successful programs developed by various chapters and alumni. It is published and accessible to any alumni entity through the clearinghouse in Memphis, providing brotherly advice for individual adaptation and use.

All ideas presented are optional, and no element is mandatory. Participation is entirely at the voluntary discretion of each alumni entity and member, recognizing that the benefit derived is proportional to the effort invested. Any language suggesting "mandatory" is framed as a recommendation, emphasizing that the model is, at most, a guide. Users are encouraged to apply their own experience and judgment, adapting, or modifying suggestions as needed. Essentially, this communication model is a reference for establishing, improving, or building individual programs, utilizing the collective knowledge, common sense, ideas, and experiences of the users. Moreover, each alumni entity is encouraged to contribute noteworthy ideas to the administrative clearinghouse for potential inclusion in future publications, fostering a collaborative exchange of insights among chapters.

## Development Guide & Checklist

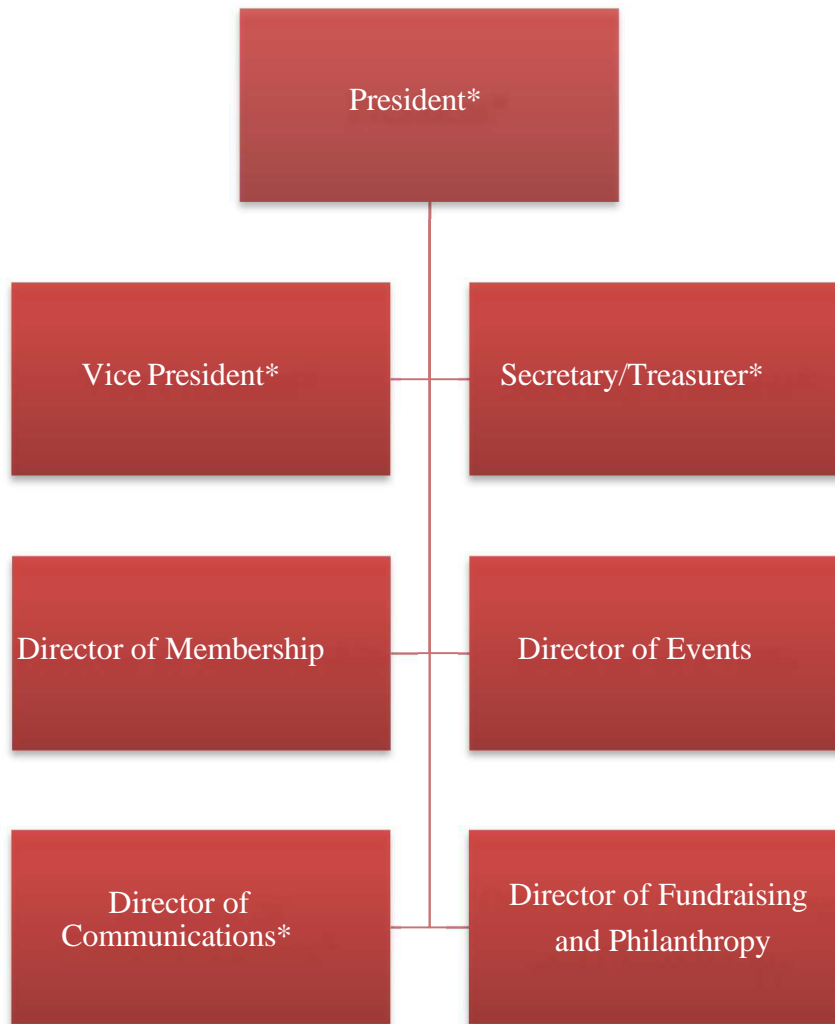
The setup of an alumni association can take various paths, as no two regional/local chapter alumni associations are built on the same foundation. This guide is specifically designed to aid those starting from scratch with minimal existing networks in the region or local chapter area. However, we expect the founders or re-founders of the association to proactively establish connections with the help of Regional Presidents, International Officers, Headquarters Staff, and local alumni entities, including chapters.

Despite the diverse ways to form an alumni association, the following is a generally recommended process:

1. Engage with the International Fraternity about the prospect of establishing an Alumni Association
  - a. Whether you have a group of prospective board members or just association members, the Alumni Department ([alumni@pikes.org](mailto:alumni@pikes.org)) can assist with a radius search of Pikes in the area, helping you connect with past staffers and notable volunteers for the association's formation.
2. Recruit the association leadership team (potential Board of Directors with recommended responsibilities in the chartering process)
  - a. President (delegating the chartering process and recruitment of the AA leadership)
  - b. Vice President (assisting with the chartering process)
  - c. Secretary/Treasurer (account set up/financial processes)
  - d. Director of Membership (delegating membership recruitment)
  - e. Director of Communication (communication of chartering events and all other promotions/outreach)
  - f. Director of Events (delegating for the chartering event)
  - g. Director of Fundraising & Philanthropy (fundraising campaign)
3. Establish the name of the Alumni Association
  - a. E.g., Omega Omega Alumni Association (after the chapter designation)
  - b. E.g., San Diego Pikes Alumni Association (city/metro/regional AA)
4. Recruit 12 or more Founding Fathers
  - a. These men will likely encompass leadership team and others willing to be involved. All names will be listed on the charter. Being listed as a Founding Father is a great way to entice involvement in the association.
5. Develop association's communication structure – see page 10
6. Open association bank account
  - a. An account should be opened in the name of the association. President and Treasurer should have access to account.
7. Create membership funding structure (either dues structure or annual campaign)
  - a. Due's structure: Dues offset administrative & communication expenses. Dues paying members may get small discounts for association activities.

- b. Annual campaign: One-time ask for gifts to fund association activities. May include support of other association sponsored activities.
- 8. Establish association bylaws
  - a. Model Bylaws document available. Bylaws should be sent to Memorial Headquarters to be archived.
- 9. Apply for Employer Identification Number via EIN Application Process document
- 10. Complete Petition to Charter document
  - a. This document will help with charter creation, reporting of association leadership and necessary documentation.
- 11. Pay the chartering fee of \$250
  - a. The chartering fee covers first year of association dues (\$150) and charter creation.
- 12. Set chartering date and event
  - a. This is a great opportunity to have a first event. Charter can be presented to associations and founding fathers. If a chapter-based association, be sure to involve the chapter, advisory board and house corporation in this process.

## ORGANIZATIONAL CHART



\* Four key initial positions to fill

## President

**Job Description:** Oversees all operations of the alumni association and coordinates all roles and responsibilities.

**Responsibility:** The President is the lead role in shaping the strategic vision of the Alumni Association, delegating responsibilities to foster initiatives that enhance the alumni experience.

- Provide strategic direction for the association, ensuring alignment with PIKE values and goal setting.
- Foster a culture of active engagement among the alumni base.
- Collaborate with all association positions to execute initiatives to enhance the overall alumni experience for regional/chapter group.

## Vice President

**Job Description:** Play a pivotal role in assisting the association president and assist in recruiting active members to enhance the alumni experience.

**Responsibility:** Collaborate with all positions of the board, assisting the president to execute short-term and long-term strategies towards the association's success.

- Assist with delegating for the overall execution of planning amongst the association's board.

## Secretary/Treasurer

**Job Description:** The Secretary/Treasurer plays a crucial role in supporting the association president and assisting in recruiting active members to enhance the alumni experience. This position involves overseeing financial matters, maintaining records, and facilitating effective communication within the board.

**Responsibility:** Assist with financial set up, communication management/structure, and document/resource management of the association.

- Send out all communication on the association's behalf.
- Ensure the board has accessibility to all documents and resources.
- Manage and maintain accurate financial records for the association.

## Director of Membership

**Job Description:** Organizes and oversees the alumni database and membership recruitment.

**Responsibility:** Maintain alumni contact information and develop initiatives to obtain contact information for lost alumni.

- Foster alumni involvement through frequent and consistent identification efforts
- Database should be synchronized with International Fraternity for archival purposes.
- Work with communications chairman to develop ways to find lost alumni through communication efforts.

## Director of Events

**Job Description:** Primary coordinator of all alumni events

**Responsibility:** Work with the association to identify opportunities for alumni to gather. Events should also be coordinated with the active (or local) chapter. A standing cultivation committee can be formed to help with the following:

- Foster alumni involvement by hosting quality alumni events that allow alumni to return to visit and interact with the chapter.
- If most alumni have to travel (i.e. back to campus), 1 – 2 events should be planned annually.
- If an area-based group (catering to local alumni), up to 3 – 4 events can be planned annually.

## Director of Communications

**Job Description:** Primary organizer and developer of physical and electronic mailings, social media and websites.

**Responsibility:** Develop and oversee robust communication efforts of alumni association. Communication efforts can also be coordinated with chapter and/or the other alumni entities, for inclusion in alumni communications. A standing communications committee can be formed to help with the following:

- Foster alumni involvement through timely and consistent newsletters
  - Physical newsletters (2 – 4 per year)
  - Electronic communications (e-newsletters and general information)
  - Social media
  - Website

## Director of Fundraising & Philanthropy

**Job Description:** Primary coordinator of all fundraising and philanthropic opportunities.

**Responsibility:** Work with the Director of Events to identify opportunities to incorporate fundraising and philanthropic efforts in conjunction with alumni events. Fundraising and philanthropic opportunities should also be coordinated with the active (or local) chapter(s).

- Support our chapter's students with scholarships through the Pi Kappa Alpha Foundation.
- Give back to the local community by providing alumni with philanthropic opportunities.



## Leadership Contacts

Position	Name	Phone	Email
President			
Vice President			
Secretary/Treasurer			
Director of Membership			
Director of Communication			
Director of Events			
Director of Fundraising & Philanthropy			
Alumni Relations Chair			

## Sample Meeting Agenda

**Omega Omega Alumni Association  
AA Informational Meeting  
June 11, 2016  
5:00 pm CST**

*Walking away from this event, we will have agreed upon the reason for organizing the alumni association, understand who is interested in serving on the alumni association board of directors, and identify the time/location of the next organizational meeting.*

### Location

Brookhaven Pub & Grill  
695 W Brookhaven Cir  
Memphis, TN 38117

### Agenda

- Open Meeting
- Introductions (name, chapter designation, initiation year, profession)
- Local Reports
  - Local chapter
  - Upcoming alumni event
  - House Corporation
  - Alumni Advisory Board
- Reason for the alumni association
  - Discuss benefits to the Alumni Association – go over mission statement and values.
- PIKE Volunteer Overview – AA's, AAB's, HC's
  - Volunteer opportunities on AA.
- Time/Location of next meeting
- Adjournment

# Communication Structure Guideline

The communication structure guideline outlines the methods and protocols for effective communication within the Pi Kappa Alpha International Fraternity's Alumni Associations (AAs). Clear communication enhances engagement, fosters collaboration, and strengthens connections among alumni members.

## Channels of Communication

- Email/Newsletters: Recommended primary mode of communication for official announcements, updates, and important information along with Newsletters/other management communication programs set by AA.
- Social Media Platforms: Utilized for informal communication, networking, and sharing of events and achievements. Official AA social media accounts will be managed by designated administrators.
- Website: Serving as a central hub for resources, event details, and contact information. Regularly updated with relevant content and announcements.

## Communication Protocols

- Timeliness: Responses to official communications should be prompt, within a reasonable timeframe. Urgent matters must be addressed expediently.
- Professionalism: All communication, whether formal or informal, should maintain a professional tone and demeanor. Respectful language and behavior are always expected.
- Clarity and Transparency: Messages should be clear, concise, and relevant to ensure understanding among recipients. Transparency should be maintained in all communications, especially regarding decisions and updates concerning the AA.
- Confidentiality: Respect the privacy and confidentiality of sensitive information shared within the AA. Refrain from sharing confidential information without proper authorization.

## Meetings

- AAs will hold regular meetings on a monthly to quarterly basis, either in person or virtually, as determined by the AA leadership.
- Meeting agendas and schedules will be communicated in advance via email and posted on the AA website. The alumni department recommends the secretary sends out the agenda in advance asking other leaders to reply with additional reports to include on the agenda.
- Attendance at meetings is encouraged for all members, and participation in discussions and decision-making processes is welcomed.

## Roles and Responsibilities

- Director of Communication/Communication Officers: Responsible for managing official communication channels, including email, social media, and the website. - Ensure timely dissemination of information and responses to inquiries.
- Committee Chairs and Board Members: Facilitate communication within their respective committees and provide updates to the AA as necessary. - Act as liaisons between their committees and the AA leadership.

## Feedback and Suggestions:

- Encourage open communication channels for feedback, suggestions, and concerns from all alumni members.
- Establish periodic surveys or feedback sessions to gather input on communication effectiveness and areas for improvement.

## Revision and Updates:

- The communication structure guideline will be periodically reviewed and updated as needed to ensure relevance and effectiveness.
- Changes to the guidelines will be communicated to all members in a timely manner.

## Frequently Asked Questions

### **What is a Pi Kappa Alpha Alumni Association?**

As an extension of the Pi Kappa Alpha International Fraternity, alumni associations are groups of alumni and friends connected to the International Fraternity and each other through leadership, programming, communication, and membership. Many of our alumni organizations plan an exciting mix of social, athletic, recreational, and academic related activities. Our chapter-based alumni association is made up of alumni from a specific designation (e.g., Alpha Chapter), regardless of geography. There are regional-based alumni associations based on where our members reside as well, such as the Dallas-Fort Worth Alumni Association.

### **What is the purpose of an alumni association?**

A Pi Kappa Alpha alumni association exists to promote brotherhood by providing an outlet for casual alumni interaction. Our new organizations will provide the opportunity for alumni to continue to benefit from their membership through fellowship, networking, social engagements, and a variety of other interactions including supporting the local or regional undergraduate men.

### **What are the financial obligations associated with an alumni association?**

Dues associated with alumni associations are left to the discretion of each group. It is common for an association to operate on a modest dues structure. Formal incorporation and 501 © status may be sought after. Funds can be used for newsletters, database management, gifts to freshmen upon initiation and senior send-off gifts from alumni and organizing local alumni events throughout the year. The long-term intent could be to provide academic performance and needs-based scholarships to local or regional undergrads, contributing to the long term, sustained success of the International Fraternity and its chapters.

### **Will we be officially recognized by the International Fraternity?**

Yes, you can apply before chartering and receive conditional approval of an alumni association “charter.” The Fraternity’s Supreme Council’s policies require that a minimum of twelve (12) men in good membership standing petition the Supreme Council for a charter and pay a one-time fee of \$250 (which includes the first year’s annual dues). Subsequently, the annual dues for each association are \$150, payable July 1st of each year. Associations will submit an annual report to the Fraternity headquarters and all alumni members of the association.

### **What are some common goals and objectives of an association?**

- a. Coordinate local alumni activities adding to and enriching the lifelong Pike experience.
- b. Assist the chapter through scholarship opportunities and other means of support.
- c. Provide career networking opportunities for both local alumni and undergrads.
- d. Raise funds for chapter house debt reduction.
- e. Annually manage Alumni Award programs recognizing outstanding volunteers/alumni who are members of the association.

## **What could the due's structure look like? How could funds be used?**

An extremely flat annual due structure is proposed that allows the association to collect administrative funds. These funds can be used to produce communications, offset costs of planning events, provide chapter support, and initiate a scholarship program. The budget and funds expended will be managed by a volunteer board of directors. This is an example of what the due's structure is for one of our Alumni Associations:

- a) First-second years out of college dues – free.
- b) Three-four years out of college – \$25 Age 26+ Annual dues – \$50.
- c) Founder/Charter membership fee of \$100 for this first year is encouraged.
- d) A Lifetime dues donor level could be explored by an alumni association.

## **Why should I join an association?**

Membership is purely voluntary. Associations are founded for many reasons but commonly to build on success and excitement for a chapter or to round up support for a silent chapter, and to continue the solid momentum to sustain chapter's success. An alumni organization formalizes a local/regional group's effort and in hopes that a membership approach leads to more consistent, yet affordable, funding for alumni activities as well as for important chapter support, debt reduction, and eventual scholarship programs. Whether an alumnus chooses to join and pay dues or not, he will continue to be in good alumni standing with the International Fraternity.

## Digital Media & Marketing Support

The International Fraternity stands committed to providing robust support to its alumni entities. Central to this commitment is our dynamic Marketing & Communication Department, dedicated to empowering alumni organizations with an array of impactful promotional materials and strategies.

Our adept marketing team excels in crafting exhibits tailored to the unique needs and aspirations of each alumni organization. From captivating newsletter headers that command attention to distinctive logos that embody the essence of your group, we specialize in delivering compelling visual identities that resonate with your audience.

Moreover, our expertise extends to producing flyers that convey your message with clarity and creativity, as well as engaging social media posts designed to amplify your reach and engagement across digital platforms. Whether it's refining your brand image, promoting upcoming events, or cultivating a thriving online presence, our graphic designs are finely tuned to elevate your visibility and influence.



## Solicitation of Membership Policy

As a member of our Fraternity, it is crucial to uphold the integrity of our alumni network. The following guidelines are outlined to ensure that our alumni contacts are used responsibly and respectfully:

**Purpose of Alumni Contacts:** Alumni contact databases are provided for the purpose of fostering meaningful connections within our fraternity. They are not to be used for personal or commercial solicitation.

**Respecting Privacy:** We value the privacy of our alumni community. Members are expected to refrain from soliciting alumni contacts for any form of solicitation without explicit authorization.

**Engagement with Alumni:** Members are encouraged to engage with alumni in a manner that respects their privacy and our fraternity's values. This includes always maintaining professional and respectful communication.

### What Not to Do:

- Do not use alumni contacts for personal gain or commercial purposes.
- Do not share alumni contacts with individuals or organizations outside of the fraternity without proper authorization.
- Do not engage in unsolicited or intrusive communication with alumni.
- Do not misuse alumni contacts for activities unrelated to fraternity-related initiatives.
- Clarification and Assistance: If there are any questions or uncertainties regarding the use of alumni contacts, members are encouraged to seek clarification from fraternity leadership.

By adhering to these guidelines, members contribute to the preservation of our fraternity's values and the integrity of our alumni network.

## Alumni Department Contacts

Russ Keene  
Chief Communications & Alumni Officer  
[rkeene@pikes.org](mailto:rkeene@pikes.org)

John Marcone  
Director of Alumni Engagement  
[jmarcone@pikes.org](mailto:jmarcone@pikes.org)

Mindy Costabile  
Volunteer Coordinator  
[mcostabile@pikes.org](mailto:mcostabile@pikes.org)

## Closing

In closing, we extend our gratitude to each member of the Pi Kappa Alpha alumni community who has explored developing an association and analyzing the insights shared in this handbook. Your dedication to fostering a thriving alumni association is integral to the continued success and growth of our Fraternity.

As we conclude this handbook, we want to emphasize that our commitment to supporting and engaging with our alumni goes beyond these pages. Our alumni department, led by the Chief Communication and Alumni Officer, Russ Keene, along with the Director of Alumni Engagement, John Marcone, and our Volunteer Coordinator, Mindy Costabile, are here to assist you in your volunteer and chapter endeavors.

Feel free to reach out to our team at [alumni@pikes.org](mailto:alumni@pikes.org) for any inquiries or support you may need. Additionally, you can contact John Marcone directly at 760-717-5021. We are eager to hear your feedback, address your questions, and work collaboratively to ensure the sustained success of our alumni entities Fraternity-wide.

Thank you for your commitment to Pi Kappa Alpha is helping lead our chapters to a future filled with continued growth, meaningful connections, and shared successes within our remarkable brotherhood.