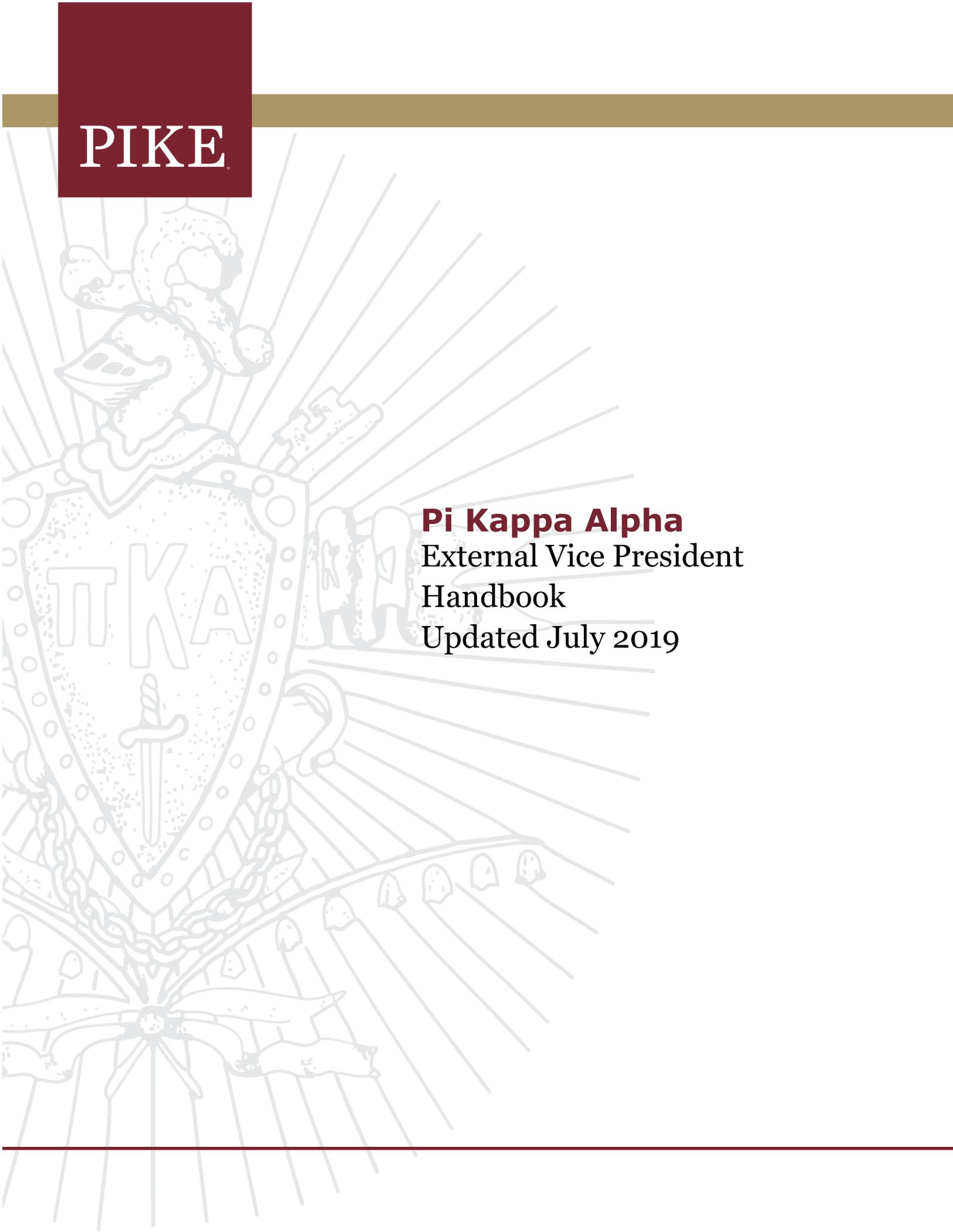


PIKE



**Pi Kappa Alpha**  
External Vice President  
Handbook  
Updated July 2019

## 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 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, over 15,000 active undergraduate members and over 300,000 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 handbook is an educational guideline which only 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 Memorial Headquarters 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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## Overview of Handbook

It is important to follow a few recommendations when reading through this handbook. The first recommendation is to think of this handbook as a guide while you are external vice president. This handbook is laid out in a fashion so that as you progress through the year, you will then advance to the next segment of the handbook. However, you do not have to read this handbook sequentially just because of that. If you only want a certain aspect of the handbook for reference, simply skip ahead to that part of the book. Also, you do not have to do everything exactly as this handbook states, but this handbook outlines some of the best practices being used today. Again, this handbook is simply a reference tool, so use it as such. If anything in this handbook does not sound familiar to you, some reevaluation and changing of processes may be in order, which leads to the next recommendation.

Do not let unfamiliarity or tradition keep you from implementing the ideas in this handbook. It is very easy to go through and simply read this handbook for general knowledge and understanding of the position. Unfortunately, things will not change or get better in your chapter unless you act. In order to get the most out of this handbook and to make the greatest impact on your chapter, it is recommended to take the ideas in this handbook and put them into action. By acting, you will get the most out of your position, which leads to the final recommendation.

Enjoy your position! No matter what reason you had for taking this position, make sure you fulfill your duties to the best of your ability. Much like the undergraduate fraternal experience, your tenure in this position will be very brief so do your best to make a positive impact and better the overall chapter. If you work your hardest to ensure this happens, you will truly have a rewarding undergraduate fraternal experience. Good luck!

## Understand your Position

### Purpose of External Operations

The purpose of external operations is to ensure that there is a positive experience and positive development for all members within the fraternity.

### Job Description

As the external vice president, you are the primary organizer and overseer of the external operations within your chapter.

**\*\*\* The following lists are examples and are not intended to be exhaustive or exclude other responsibilities as determined by the chapter. \*\*\***

### Goal

- ◆ Ensure progress toward and ultimately successful completion of all goals set related to external operations.

### Weekly Tasks

- ◆ Perform the tasks of the chapter president in his absence
- ◆ Attend and give a report at weekly executive council and chapter meetings
- ◆ Hold and preside over weekly committee chairmen meetings
- ◆ Work to fulfill goals related to external operations
- ◆ Manage the external cabinet budget
- ◆ Maintain regular communication with the alumni operation's advisor
- ◆ Motivate the committee chairmen (outlined below) to perform the tasks assigned to them:
  - Athletics chairman
    - Organizes teams and captains to participate in intramurals
    - Creates and distributes intramural jerseys
    - Attends intramural organization meetings
    - Organizes tryouts and practices for intramurals
    - Organize support of and recruitment from varsity and club athletics
    - Documents intramural performance and participation
    - Documents varsity and club athletics involvement
    - Produces and manages a budget of estimated expenses for his committee
    - Holds a weekly committee meeting (if applicable)
    - Reports weekly on committee progress
  - Campus involvement chairman
    - Keeps records of who is involved in which organizations
    - Targets important/major organizations for members to be involved
    - Assists members' involvement on campus
    - Enables the chapter to attend campus events
    - Keeps track of both individual involvement and total chapter involvement
    - Produces and manages a budget of estimated expenses for his committee
    - Holds a weekly committee meeting (if applicable)
    - Reports weekly on committee progress
  - Community service chairman
    - Plans and organizes all sponsored community service projects
    - Plans and organizes all philanthropy projects
    - Works with public relations chair to publicize events
    - Keeps detailed records of projects and track both individual service hours and total chapter service hours

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- Writes event summaries for future chairmen to use for reference
- Produces and manages a budget of estimated expenses for his committee
- Holds a weekly committee meeting (if applicable)
- Reports weekly on committee progress
- Public relations chairman
  - Develops the PIKE brand and identifies stakeholders
  - Develops special initiation program
  - Creates the chapter website and regularly maintains the website
  - Produces print and/or electronic newsletters at least once per semester/quarter
  - Manages social media outlets on a regular basis
  - Writes and distributes at least two press releases per semester/quarter
  - Submits notes to the *Shield & Diamond* three times per year
  - Manages crisis communication as necessary
  - Produces and manages a budget of estimated expenses for his committee
  - Holds a weekly committee meeting (if applicable)
  - Reports weekly on committee progress
- Social chairman
  - Plans and organizes all social events including mixers, date parties, semi-formal, formal, and socials.
  - Ensure proper risk preparedness and prevention occurs for events
  - Produces and manages a budget of estimated expenses for his committee
  - Holds weekly committee meetings (if applicable)
  - Reports weekly on committee progress
- Special events chairman
  - Plans and organizes all participation in campus competitions
  - Produces and manages a budget of estimated expenses for his committee
  - Holds weekly committee meetings (if applicable)
  - Reports weekly on committee progress

## Semester/Quarter Tasks

- ◆ Set goals for external operations
- ◆ Set the external operations budget
- ◆ Work with the executive council to organize a chapter goal-setting retreat, officer retreat, and transition retreat
- ◆ Appoint the following committee chairmen and ensure all positions are filled:
  - Athletics chairman
  - Campus involvement chairman
  - Community service chairman
  - Public relations chairman
  - Social chairman
  - Special events chairman
- ◆ Create and maintain a uniform external vice president handbook including guidelines, ideas, and suggestions for future external vice presidents
- ◆ Ensure all chairmen in the external cabinet are maintaining uniform handbooks including guidelines, ideas, and suggestions for future chairmen
- ◆ Ensure all chairman in the external cabinet coordinate successful transitions to their successors
- ◆ Assist in the completion and submission of a Year End Summary

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## **Completion of Position**

Once the new external vice president is elected, schedule a time to meet and transition your successor into their new role. Review the position and provide written notes to successor and any other materials that were developed during your tenure as external vice president. This may include a uniform external vice president handbook with guidelines, ideas, and suggestions; like this one.

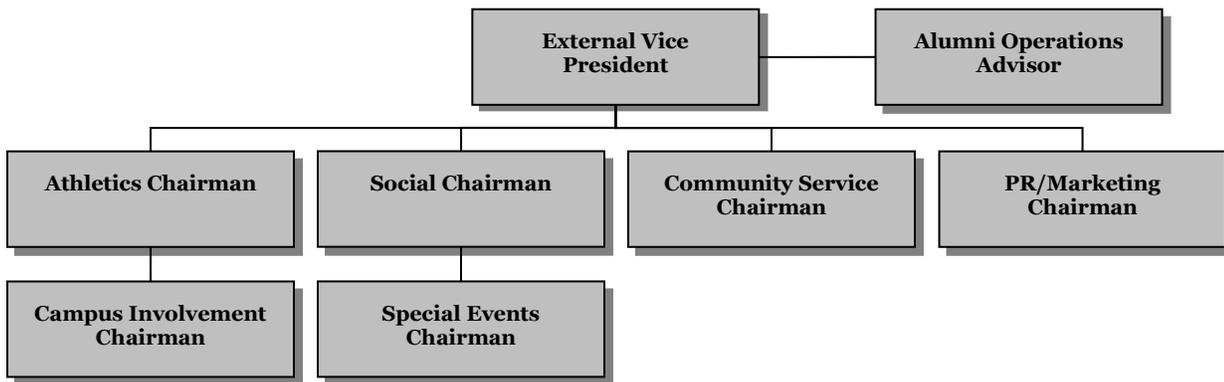
## **Create the Plan for your Position**

### **Organize the Committee Chairs**

In order to most effectively accomplish your duties as the external vice president, it is important to form a functioning external cabinet made up of appointed committee chairs. The steps involved with forming your cabinet are: (1) determining who is interested in being a chair of a committee and (2) which positions each person should be appointed to in the cabinet.

The first step to organizing the external cabinet is determining who wants to be appointed as a committee chair. In order to get the best response for involvement, you want to engage the chapter membership through numerous avenues, typically via electronic communication such as e-mail or Facebook as well as in person during the chapter meeting or a separate meeting. Prior to sending out communication asking for help from chapter members, you want to make sure you have a way to meet with all of those interested and assign responsibilities, typically through a meeting on campus or in the chapter house (if applicable). Once the meeting location is finalized, you simply want to engage the chapter by telling those who are interested about the meeting time and location. Ask for chapter members to hold up their hands if interested when in chapter meeting and to respond if sent out over e-mail. This is to ensure you have interest from the members since otherwise you will have to appoint and ask certain members to be a committee chair. Once you have verified involvement from chapter members, you will need to determine which chapter members would be best qualified to hold positions as committee chairs. It is important to consider previous chapter involvement, campus involvement, age, major, class load, etc. when determining who would be best qualified for certain positions, but ultimately the final decision should be left up to you as external vice president with input from the executive council. Committee chairs are very important positions, so it is important to screen, and judge interested candidates similarly to a business interviewing candidates for a new job position. Once you have determined the best qualified candidates for each position, it is important to inform each of them of their position appointment and invite/inform them of the previously planned meeting time and location.

The purpose of the meeting with the chapter members who will be involved is to inform each person of their new role and title in addition to providing them with any material that will help them successfully fulfill each position including the position handbook. Ensure each chair reviews and understands all this information since this will prepare the newly appointed committee chairs for their positions. Once each man understands his position, you should also work to set goals for each position. In order to properly set goals, it is important to setup individual meetings with each committee chair. These meetings should last no longer than thirty minutes, but it is important to hold these meetings in order to ensure the person holding the position is aligned with the goals of the chapter while giving him ownership of the position.



The six undergraduate chapter members hold the positions of athletics chairman, campus involvement chairman, community service chairman, public relations chairman, social chairman and special events chairman. The one alumnus member holds the position of alumni operations advisor which is a member of the alumni advisory board. A full-page overview of each position which can be given to each member of the external cabinet and can be found starting on the next page in this handbook.

Once you have organized the external cabinet, you will want to be continually updated on progress with tasks that the committee chairs are charged with, so it is recommended to hold weekly external cabinet meetings. During these meetings it is important to allow every person in the cabinet to detail what it is they have done in the past week, what they failed to do in the past week, and anything that they plan to do or major events that are taking place in the near future. It is even helpful to utilize and expect a report from each committee chair, like the one outlined on page 17. These meetings should not take long but it is a simple way to help ensure all necessary work is completed while also effectively delegating responsibilities.

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## **Athletics Chairman**

### **Purpose of Athletics**

The purpose of athletics is to ensure that each chapter member can have fun while staying physically fit and be competitive by participating in some form of athletics.

### **Job Description**

As the athletics chairman, you are the primary organizer and overseer of the intramural program within the chapter.

**\*\*\* The following lists are examples and are not intended to be exhaustive or exclude other responsibilities as determined by the chapter. \*\*\***

### **Goals**

- ◆ Ensure that every chapter member is eager and able to participate and compete in some form of athletics.
- ◆ Ensure that records of athletics are kept to improve athletic performance in the future.

### **Weekly Tasks**

- ◆ Hold weekly athletics committee meetings
- ◆ Attend and giving a report at weekly committee chair and chapter meetings
- ◆ Work to fulfill goals related to athletics
- ◆ Manage the athletics budget
- ◆ Manage team captains to organize teams based on tryouts and participate in intramurals with practices
- ◆ Attend intramural council meetings (as necessary)
- ◆ Assist the recruitment chairman in the recruitment of varsity and club athletes
- ◆ Document intramural performance and varsity and club athletics involvement
- ◆ Document attendance and participation at each athletics event

### **Semester/Quarter Tasks**

- ◆ Structure and organize an athletics committee
- ◆ Set goals related to athletics
- ◆ Set the athletics budget
- ◆ Create intramural team jerseys
- ◆ Create incentives and benefits within the athletics program to entice greater athletic involvement within the chapter
- ◆ Create and maintain a uniform athletics handbook including guidelines, ideas, and suggestions for future athletics chairman
- ◆ Assist in the completion and submission of a Year End Summary

### **Completion of Position**

- ◆ Review position with the new athletics chairman and provide a written note to successor and any other materials that were developed during your tenure as athletics chairman including a uniform athletics handbook with guidelines, ideas, and suggestions for future athletics chairman

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## **Campus Involvement Chairman**

### **Purpose of Campus Involvement**

The purpose of campus involvement is to ensure that each chapter member can develop leadership and social skills by participating in other campus organizations.

### **Job Description**

As the campus involvement chairman, you are the primary organizer and overseer of the campus involvement program within the chapter.

**\*\*\* The following lists are examples and are not intended to be exhaustive or exclude other responsibilities as determined by the chapter. \*\*\***

### **Goals**

- ◆ Ensure that every chapter member is eager and able to participate in other campus organizations and events.
- ◆ Ensure that records of involvement are kept improving campus involvement in the future.

### **Weekly Tasks**

- ◆ Hold weekly campus involvement committee meetings
- ◆ Attend and give a report at weekly committee chair and chapter meetings
- ◆ Work to fulfill goals related to campus involvement
- ◆ Manage the campus involvement budget
- ◆ Notifying/recommend attendance by the chapter membership at campus events
- ◆ Document attendance at each campus event
- ◆ Document the involvement of each chapter member including any positions held within organizations

### **Semester/Quarter Tasks**

- ◆ Structure and organize a campus involvement committee
- ◆ Set goals related to campus involvement
- ◆ Set the campus involvement budget
- ◆ Evaluate and identify major/important student organizations
- ◆ Notify each organization at the beginning of the semester that chapter members may be interested in joining
- ◆ Coordinate the involvement of every chapter member
- ◆ Planning and recommending elections for major positions each academic term
- ◆ Create and maintain a uniform campus involvement handbook including guidelines, ideas, and suggestions for future campus involvement chairman
- ◆ Assist in the completion and submission of a Year End Summary

### **Completion of Position**

- ◆ Review position with the new campus involvement chairman and provide a written note to successor and any other materials that were developed during your tenure as campus involvement chairman including a uniform campus involvement handbook with guidelines, ideas, and suggestions for future campus involvement chairman

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## Community Service Chairman

### Purpose of Community Service

The purpose of community service is to ensure that each chapter member can donate time and raise money for benefit of the community of the chapter.

### Job Description

As the community service chairman, you are the primary organizer and overseer of the community service and philanthropy programs within the chapter.

**\*\*\* The following lists are examples and are not intended to be exhaustive or exclude other responsibilities as determined by the chapter. \*\*\***

### Goals

- ◆ Ensure that every chapter member is eager and able to participate in community service and philanthropy events.
- ◆ Ensure that records of community service and philanthropy are kept to improve community service and philanthropy in the future.

### Weekly Tasks

- ◆ Hold weekly community service committee meetings
- ◆ Attend and give a report at weekly committee chair and chapter meetings
- ◆ Work to fulfill goals related to community service
- ◆ Manage the community service budget

### Semester/Quarter Tasks

- ◆ Structure and organize a community service committee
- ◆ Set goals related to community service
- ◆ Set the community service budget
- ◆ Creating and maintain a community service spreadsheet to track the community service of each chapter member, each event, and overall chapter efforts
- ◆ Create and maintain a philanthropy spreadsheet to track the philanthropy efforts of each chapter member, each event, and the overall chapter
- ◆ Host one major community service event
- ◆ Host one major philanthropy event
- ◆ Co-host one major community service event with another student organization
- ◆ Co-host one major philanthropy event with another student organization
- ◆ Participate in other major community service events around campus
- ◆ Participate in other major philanthropy events around campus
- ◆ Create and maintain a uniform community service handbook including guidelines, ideas, and suggestions for future community service chairman
- ◆ Assist in the completion and submission of a Year End Summary

### Completion of Position

- ◆ Review position with the new community service chairman and provide a written note to successor and any other materials that were developed during your tenure as community service chairman including a uniform community service handbook with guidelines, ideas, and suggestions for future community service chairman

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## **Public Relations Chairman**

### **Purpose of Public Relations**

The purpose of public relations is to build rapport with all audiences of the chapter.

### **Job Description**

As the public relations chairman, you are the primary organizer and overseer of the public relations program that ultimately builds rapport with audiences of the chapter.

**\*\*\* The following lists are examples and are not intended to be exhaustive or exclude other responsibilities as determined by the chapter. \*\*\***

### **Goals**

- ◆ Ensure that every audience is well-informed of chapter accomplishments and has a positive perception of the chapter.

### **Weekly Tasks**

- ◆ Hold weekly public relations committee meetings
- ◆ Attend and give a report at weekly committee chair and chapter meetings
- ◆ Work to fulfill goals related to public relations
- ◆ Manage the public relations budget
- ◆ Manage social media outlets on a regular basis
- ◆ Regularly maintain the website
- ◆ Manage crisis communication as necessary

### **Semester/Quarter Tasks**

- ◆ Develop the “PIKE Brand” and identify stakeholders
- ◆ Develop special initiation program
- ◆ Create the chapter website
- ◆ Produce print and/or electronic newsletters at least once per semester/quarter
- ◆ Write and distribute at least 2 press releases per semester/quarter
- ◆ Submit notes to the Shield & Diamond 3 times per year
- ◆ Structure and organize a public relations committee
- ◆ Set goals related to public relations
- ◆ Set the public relations budget
- ◆ Create and maintain a uniform public relations handbook including guidelines, ideas, and suggestions for future public relations chairman
- ◆ Assist in the completion and submission of a Year End Summary

### **Completion of Position**

- ◆ Review position with the new public relations chairman and provide a written note to successor and any other materials that were developed during your tenure as public relations chairman including a uniform public relations handbook with guidelines, ideas, and suggestions for future public relations chairman

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## Social Chairman

### Purpose of Social

The purpose of social is to ensure that each chapter member can meet and interact with new people in a social context.

### Job Description

As the social chairman, you are the primary organizer and overseer of the events that allow chapter members to meet new people in a social context.

**\*\*\* The following lists are examples and are not intended to be exhaustive or exclude other responsibilities as determined by the chapter. \*\*\***

### Goals

- ◆ Ensure that every chapter member is eager and able to participate in events in order to meet new people.
- ◆ Ensure that risks are mitigated before, during and after each event.

### Weekly Tasks

- ◆ Hold weekly social committee meetings
- ◆ Attend and give a report at weekly committee chair and chapter meetings
- ◆ Work to fulfill goals related to social
- ◆ Manage the social budget
- ◆ Document attendance at each social event
- ◆ Evaluate and document risk evaluation, preparation and management before, during and after each event

### Semester/Quarter Tasks

- ◆ Structure and organize a social committee
- ◆ Set goals related to social
- ◆ Set the social budget
- ◆ Plan and hold one formal
- ◆ Plan and hold one semi-formal
- ◆ Plan and hold multiple mixers
- ◆ Plan and hold multiple date parties
- ◆ Plan and hold multiple socials
- ◆ Plan and hold multiple parties
- ◆ Create and maintain a uniform social handbook including guidelines, ideas, and suggestions for future social chairman
- ◆ Assist in the completion and submission of a Year End Summary

### Completion of Position

- ◆ Review position with the new social chairman and provide a written note to successor and any other materials that were developed during your tenure as social chairman including a uniform social chairman handbook with guidelines, ideas, and suggestions for future social chairman

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## Special Events Chairman

### Purpose of Special Events

The purpose of special events is to ensure that the chapter is positively represented by participating and competing in events/competitions on campus.

### Job Description

As the special events chairman, you are the primary organizer and overseer of participating and competing in events/competitions on campus.

**\*\*\* The following lists are examples and are not intended to be exhaustive or exclude other responsibilities as determined by the chapter. \*\*\***

### Goals

- ◆ Ensure that the chapter is well-represented in campus events/competitions.

### Weekly Tasks

- ◆ Hold weekly special events committee meetings
- ◆ Attend and give a report at weekly committee chair and chapter meetings
- ◆ Work to fulfill goals related to special events
- ◆ Manage the special events budget
- ◆ Document attendance and participation at each special event competition

### Semester/Quarter Tasks

- ◆ Structure and organize a special events committee
- ◆ Set goals related to special events
- ◆ Set the special events budget
- ◆ Plan and compete in homecoming (if applicable)
- ◆ Plan and compete in Greek week (if applicable)
- ◆ Plan and compete in philanthropies
- ◆ Plan and compete in other campus competitions (if applicable)
- ◆ Create and maintain a uniform special events handbook including guidelines, ideas, and suggestions for future special events
- ◆ Assist in the completion and submission of a Year End Summary

### Completion of Position

- ◆ Review position with the new special events chairman and provide a written note to successor and any other materials that were developed during your tenure as special events chairman including a uniform special events handbook with guidelines, ideas, and suggestions for future special events chairman

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## **Alumni Operations Advisor**

### **Job Description**

As the alumni education advisor, you provide counsel and advice to the external vice president and external cabinet within the chapter.

**\*\*\*The following lists are examples and are not intended to be exhaustive or exclude other responsibilities as determined by the chapter. \*\*\***

### **Goals**

- ◆ Ensure the external operations budget is planned at least two weeks prior to the start of the academic year
- ◆ Maintain regular communication with the external vice president and committee

### **Weekly Tasks**

- ◆ Communicate over phone or e-mail with the external vice president
- ◆ Ensure the external operations budget is maintained appropriately throughout the year

### **Monthly Tasks**

- ◆ Communicate in person at least once with the external vice president
- ◆ Attend an external cabinet meeting at least once
- ◆ Review of external vice president goals
- ◆ Communicate with AAB Chairman

### **Semester/Quarter Tasks**

- ◆ Assist external vice president with goal setting
- ◆ Assist in officer transition

### **Transition of External Vice President**

- ◆ Ensure the previous external vice president transfers knowledge to the new external vice president by holding and attending a transition retreat/meeting
- ◆ Ensure the external vice president handbook is maintained and updated for transition

**(PLEASE REMOVE AND PROVIDE TO APPOINTED ALUMNUS MEMBER)**

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## **Sample Weekly Committee Member Report**

*Please provide a 2-3 sentence answer for each question.*

**What have you done in the past week?**

**What have you failed to do in the past week?**

**What do you plan to do in the upcoming week?**

**What other events take place soon?**

**Do your events/activities cost any money?**

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## Set the Goals for your Position

Describe how your goals are dependent upon the goals of your committees. As the external vice president, you assume the role of a manager for your committees.

When setting goals for any position, you should always determine the metric that you can use to appropriately determine success or failure with your work. Since the objective as external vice president includes ensuring progress toward and ultimately successful completion of all goals set related to external operations, you must determine metrics that will allow you to determine success or failure when your position is complete in addition to giving status updates while performing the duties as external vice president. You want to determine how you can best judge whether the chapter is accomplishing these objectives.

Upon evaluation of this objective, you can begin to make assumptions about how to appropriately accomplish this objective. You can easily assume that holding weekly committee chairman meetings and properly managing your committee chairman to ensure they accomplish the goals for their committees effectively will fulfill the first objective.

Nonetheless, this means that since you are a manager of the committee chairman that your goals are dependent upon each committee chairman achieving their goals. This leaves you with your many goals for the external vice president position and allows you to easily get a weekly update on how the chapter is performing with external operations so that you may make changes or corrections if necessary. You should take note of these goals that you have now set and continually revisit them on a weekly basis. Again, the goals you have set are:

- ◆ Hold weekly committee chairman meetings with proper documentation and accountability
- ◆ Properly manage your committee chairman to ensure they accomplish the following:
  - Athletics
    - First place in ALL intramural sports competitions
    - Provide detailed statistics and pictures from every PIKE team intramural game
  - Campus Involvement
    - Every member is involved in at least one other campus organization
    - PIKE holds executive positions (preferably president) of (at least) the five most influential campus organizations
    - Documentation is continually kept for campus involvement for every chapter member
  - Community Service
    - Host and photograph one major community service event
    - Host and photograph one major philanthropy event
    - Creating and maintain a community service spreadsheet to track the community service of each chapter member, each event, and overall chapter efforts
    - Create and maintain a philanthropy spreadsheet to track the philanthropy efforts of each chapter member, each event, and the overall chapter
  - Public Relations
    - Create and regularly maintain the chapter website
    - Produce print and/or electronic newsletters at least once per semester/quarter
    - Manage social media outlets on a regular basis
    - Write and distribute at least two press releases per semester/quarter
    - Submit notes to the *Shield & Diamond* three times per year
    - Manage crisis communication as necessary
  - Social
    - Organize and hold at least one formal per semester/quarter

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- Organize and hold at least one semi-formal per semester/quarter
- Organize and hold at least one social event (either mixers, date parties, socials and parties) per month
- Evaluate and document risk evaluation, preparation and management before, during and after every event
- Special Events
  - Win homecoming (if applicable)
  - Win Greek week (if applicable)
  - Win all philanthropies participated in
  - Win all other campus competitions (if applicable)

Now that you have set the goals for your position, you can now set the overall financial goal so that you may successfully accomplish the goals for external operations.

### **Set the Budget for your Position**

When setting the budget for external operations, you must take into consideration all the possible expenses that may be incurred by your committees and then work with the treasurer to allocate the correct amount of the budget to the committees within external operations. You can first begin to think of all the expenses that will be incurred by your committees.

After reviewing the expenses of external operations, you can assume that the list of expenses will look something like this:

- ◆ Athletics
  - Team registrations
  - Facilities for tryouts and practices
  - Misc. athletic gear
- ◆ Campus Involvement
  - Student government incentive
  - Student orientation leader incentive
  - Student ambassador incentive
  - Honor organization dues
- ◆ Community Service
  - PIKE philanthropy event
  - PIKE community service event
  - Co-hosted philanthropy event
  - Co-hosted community service event
  - Participated community service events
  - Participated philanthropy events
- ◆ Public Relations
  - Chapter website
  - Newsletter expenses
- ◆ Social
  - Formal
  - Semi-formal
  - Mixers
  - Date parties
  - Parties
- ◆ Special Events
  - Homecoming supplies

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- Greek Week supplies
- Philanthropy expenses
- Campus competition expenses

Once you have determined what the expenses will be by discussing this with your committee chairmen, you can then begin to work with the treasurer to ensure the correct amount is allocated to the external operations budget. The best way to go about working with the treasurer is to submit this information with the approximate corresponding amounts into the treasurer on the committee budget request form. This form can be found online at [www.pikes.org](http://www.pikes.org) in the financial documents of the officer resources. It would be beneficial to practice working with this document to make sure you fully understand how it works before developing your external operations budget with the document. After entering this information, the document you submit to the treasurer should look something like the table listed below:

<b>ΩΩ Chapter of The Pi Kappa Alpha International Fraternity</b>		
<b>External Operations Budget Request Form</b>		
<b>Event/Activity</b> (see detail pages for more)		<b>Amount</b>
<b>Athletics</b>	<b>\$</b>	<b>600</b>
<b>Campus Involvement</b>	<b>\$</b>	<b>550</b>
<b>Community Service</b>	<b>\$</b>	<b>10,000</b>
<b>Public Relations</b>	<b>\$</b>	<b>500</b>
<b>Social</b>	<b>\$</b>	<b>15,000</b>
<b>Special Events</b>	<b>\$</b>	<b>5,000</b>
<b>Total Budget Request</b>	<b>\$</b>	<b>31,650</b>

Once you have submitted this document, after approximately a week the treasurer should have a fully developed budget and the amount you requested should be fulfilled. If there are any discrepancies, make sure to work with the treasurer to resolve any issues. The budget is now set to enable you to accomplish the goals set for your external committees. You are now able to move on to planning the tentative external operations schedule for the year.

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# Sample Committee Request Form

<Chapter Name> Chapter of The Pi Kappa Alpha International Fraternity

<Insert Committee Name>

Line Item Details with Monthly Breakdown

Event/Activity	Line Item Details	Total Cost	Jan	Feb	Mar	Apr	May	Jun
<Activity 1>		\$ -						
		\$ -						
		\$ -						
		\$ -						
		\$ -						
<b>Event/Activity Totals</b>		<b>\$ -</b>						
<Activity 2>		\$ -						
		\$ -						
		\$ -						
		\$ -						
		\$ -						
<b>Event/Activity Totals</b>		<b>\$ -</b>						
<Activity 3>		\$ -						
		\$ -						
		\$ -						
		\$ -						
		\$ -						
<b>Event/Activity Totals</b>		<b>\$ -</b>						
<Activity 4>		\$ -						
		\$ -						
		\$ -						
		\$ -						
		\$ -						
<b>Event/Activity Totals</b>		<b>\$ -</b>						
<Activity 5>		\$ -						
		\$ -						
		\$ -						
		\$ -						
		\$ -						
<b>Event/Activity Totals</b>		<b>\$ -</b>						
<Activity 6>		\$ -						
		\$ -						
		\$ -						
		\$ -						
		\$ -						
<b>Event/Activity Totals</b>		<b>\$ -</b>						
<Activity 7>		\$ -						
		\$ -						
		\$ -						
		\$ -						
		\$ -						
<b>Event/Activity Totals</b>		<b>\$ -</b>						
<Activity 8>		\$ -						
		\$ -						
		\$ -						
		\$ -						
		\$ -						
<b>Event/Activity Totals</b>		<b>\$ -</b>						

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## **Plan the Event Schedule for the Year**

Planning the event schedule for external operations is a very simple process since it depends primarily on the duties and responsibilities of each chairman. The following descriptions are excerpts of planning for each of your committee chairman from their respective handbooks. It is important to become familiar with the scheduling responsibilities of each of your chairman so you can work with them to plan the event schedule accordingly.

### **Athletics**

Planning the event schedule for the athletics program is a very simple process since it depends primarily on the intramural schedule, which is coordinated by the intramural association or recreation center or some other university entity. Therefore, in order to properly plan the event schedule, it is important to attend meetings of the intramural association at the outset of the academic year. By attending these meetings, you should be able to develop a rough outline of when certain sports take place throughout the year. It is important to have this rough outline established so that you and the rest of the chapter have enough foresight in order to properly prepare for each sport.

As time passes and different sports take place, the schedule will change as well since it will be based on the performance of the PIKE teams playing intramurals. It will be important to provide continual reminders to chapter members since the intramural schedule will be constantly changing. You should update and communicate the schedule on a weekly basis to ensure that there is no confusion amongst the chapter members. If you maintain clear communication and continually update your schedule based on the intramural schedule and PIKE performance, the chapter should be more capable to have better performance and higher attendance at all intramural games.

### **Campus Involvement**

Contrary to many other positions in the chapter, the campus involvement position does not involve organizing or putting on events throughout the year. However, it is the duty of the campus involvement chairman to document all campus events that are taking place by organizing and communicating a campus events calendar. The calendar that is maintained and updated by the campus involvement chairman should contain any other date that is relevant to the campus and community. Additionally, the calendar should be shared and communicated with the secretary, so the chapter calendar contains all important dates.

The campus involvement chairman will solicit for and notify the chapter of important or relevant events and meetings over email, Facebook, and even during chapter meetings. Whenever you receive information about events, make sure that this information is documented in the calendar you are keeping. Additionally, make sure you share this calendar with the secretary since his calendar will be shared with members of the chapter either through email, Google Calendar, Microsoft Outlook, or any other means that will successfully inform members of the chapter of upcoming events. It may be helpful to send out weekly email reminders to the chapter as well. This will help constantly remind members of the different events that they have available to them.

It may not be your primary job to setup and organize all the events that are happening on campus. It is extremely important, however, that you fulfill this part of your duties as campus involvement chairman since your duties will directly impact the overall influence that the chapter has on campus. If you can remain organized and clearly communicate all campus happenings to the membership, the chapter will see greater results from their involvement and ultimately realize a better chapter fraternal experience.

### **Community Service**

Planning the event schedule for your tenure as community service chairman should be simple. There are two parts to planning the event schedule for the community service program. One part involves setting dates for the PIKE philanthropy event and for the PIKE community service event that should both fit into the chapter calendar. The second part depends primarily on events around campus and the community, which are coordinated by other organizations.

For the first part of planning the event schedule for community service, since you only must plan for two PIKE sponsored events, you should first work to identify the length of time that these events will last. These events can last anywhere from a weekend to a week-long in length. It is up to you to determine what timeframe will be most effective for the results you are trying to achieve with your events.

Once you have finalized how long the PIKE sponsored events will last, you can then choose which weekends or weeks these events will take place. This is a fairly simple process and it should be completed during the chapter goal-setting retreat and/or executive council retreat, well in advance of the actual events. If it has not already been planned, pick weekends or weeks when there are not many other events or commitments by chapter members. If the events have been identified far enough in advance, there should be plenty of time to properly plan and execute the events.

For the second part of planning the event schedule for community service, since your involvement depends on the efforts of other organizations, it is important to continually attend meetings of these organizations or maintain consistent communication with these organizations throughout the academic year. By attending these meetings or having members of your committee attend these meetings, you should be able to develop a rough outline of when certain events and opportunities take place throughout the year. It is important to have this rough outline established so that you and the rest of the chapter have enough foresight in order to properly prepare for each event and opportunity.

It will be important to provide continual reminders to chapter members since the community service schedule will be constantly changing. You should update and communicate the schedule on a weekly basis to ensure that there is no confusion amongst the chapter members, so they always have opportunities to participate in community service and philanthropy efforts. If you maintain clear communication and continually update your schedule based on the different organization events, the chapter should be more capable to participate and be involved in community service and philanthropy efforts.

### **Public Relations**

Planning the event schedule for the public relations program is a very simple process since it depends primarily on the chapter schedule. Therefore, in order to properly plan the event schedule, it is important to regularly coordinate with the chapter secretary and other chairman in the chapter to understand what events are taking place. It is important to have this rough outline established so that you and your committee have enough foresight in order to properly prepare and respond to each event. As time passes and different events take place, the duties of the public relations committee will change as well since it will be based on the results of these events and if any other notable occasions come up. If you maintain clear communication with media outlets and the communications avenues the public relations committee oversees and continually update your schedule based on the chapter schedule, the chapter should be more capable to broadcast a great image to all stakeholders.

### **Social**

Planning the event schedule for your tenure as social chairman should be simple. There is a minimum of one social event per month and a formal as well as a semi-formal that you should plan to fit into the chapter calendar. This means that one social event per month and a formal as well as a semi-formal

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should be included on the chapter calendar, but all of the other chapter events on the calendar take precedence over holding any more social events than those listed above. The reason for this is that you want the men in the chapter to enjoy the other aspects of the fraternity to have a complete fraternal experience.

Since you must plan for one social event per month and a formal as well as a semi-formal, you should first work to identify the length of time that each event will last. Each social event can vary from a few hours for something such as a mixer or date party to a day or more for something such as formal or semi-formal. It is important to research each event and develop a tentative timeframe for each event. Once you have finalized how long each social event will last, you can then choose when each event will take place. This is a fairly simple process and it should be completed during the chapter goal-setting retreat and/or executive council retreat, well in advance of the actual event. If it has not already been planned, pick the appropriate dates and times when there are not many other events or commitments by chapter members. If the event has been identified far enough in advance, there should be plenty of time to properly plan and execute the event.

Again, it is not necessary to hold more social events after you have held one for the month along with formal and semi-formal for the semester. If you do choose to hold more social events though, you can go through a similar process when planning the other events.

### ***Special Events***

Planning the event schedule for special events is a very simple process since it depends primarily on the events around campus, which are all coordinated by different campus organizations such as Order of Omega, IFC, the student programming board, etc. Therefore, in order to properly plan the event schedule, it is important to attend meetings of these organizations at the outset of the academic year. By attending these meetings, you should be able to develop a rough outline of when certain events take place throughout the year. It is important to have this rough outline established so that you and the rest of the chapter have enough foresight in order to properly prepare for each event.

As time passes and different events take place, the schedule will change as well since it will be based on the performance of the chapter competing in these events and the array of different portions of the competitions. It will be important to provide continual reminders to chapter members since the event schedule will be constantly changing. You should update and communicate the schedule on a weekly basis and even more frequently when the events are taking place to ensure that there is no confusion amongst the chapter members. If you maintain clear communication and continually update your schedule based on these events and PIKE performance, the chapter should be more capable to have better performance and higher attendance at all special events.

By being able to work with each of your committee chairman and organize an in-depth, descriptive calendar, you will be more able to successfully accomplish the duties of external vice president.

## **Retreats**

### ***The Executive Council Retreat***

Once a semester/quarter, there will be an executive council retreat. All members of the executive council and members of the alumni advisory board should be in attendance for this retreat. The purpose of this retreat is to review the performance of the chapter during the previous semester/quarter, develop the long-term strategic plan of the chapter including goals for the upcoming semester/quarter, build camaraderie with the executive council and alumni advisory board, and address any other issues that the chapter may currently be facing. It is important to have this retreat because this will allow the chapter to maintain proper development over time while also ensuring that there is a good relationship

between all members of the executive council and between the executive council and alumni advisory board.

This retreat will be approximately one to two days of time from each person involved so it is best to schedule this retreat for a weekend. The executive council and alumni advisory board will both be involved with this retreat, so it is best to plan for a time when most members of both groups are available. It is also beneficial to hold this retreat away from the chapter house and the membership so that the executive council can focus on the tasks at hand while not being distracted. Determine the date for this retreat when setting the calendar for the chapter. Typically, these retreats are held on a weekend near the end of the semester/quarter in order to properly prepare for the upcoming semester/quarter.

### **The Transition Retreat**

Once a semester/quarter, there will be a transition retreat. All members of the executive council and each chairman, new and old, should be in attendance for this retreat. The purpose of this retreat is to review the performance of the chapter during the previous semester/quarter, assist the new executive council and chairmen in setting upcoming goals, and allow the old chairmen to transition materials and knowledge to the new chairmen. It is important to have this retreat because this will allow the chapter to maintain proper operations over time.

This retreat will be roughly a few hours of time from each person involved so it is best to schedule this retreat for a weekend. The executive council and all transitioning chairmen will both be involved with this retreat, so it is best to plan for a time when most members of both groups are available. It is also beneficial to hold this retreat away from the chapter house and the membership so that the executive council and chairmen can focus on the tasks at hand while not being distracted. Determine the date for this retreat when setting the calendar for the chapter. Typically, these retreats are held on a weekend near the end of the semester/quarter before the executive council retreat in order to properly prepare for the upcoming semester/quarter.

### **The Chapter Goal Setting Retreat**

After the transition and executive council retreats, the goals of the chapter should be roughly developed. It is important to communicate these goals to the chapter in order to gain feedback and buy-in from the membership. The best way to do this is by holding a chapter goal setting retreat.

Once a semester/quarter, there will be a goal setting retreat. All members of the chapter should be in attendance for this retreat. The purpose of this retreat is to communicate the goals set by the men who hold positions for the upcoming semester/quarter to the rest of the chapter. It is important to have this retreat because the chapter will clearly understand and be unified toward achieving the goals for the next semester/quarter.

This retreat will be roughly a few hours of time so it is best to schedule this retreat for a time that is consistent with events where most of the chapter can attend, such as chapter meetings. It is beneficial to hold this retreat away from the chapter house or other noisy areas so that the chapter can focus on the goals while not being distracted. Determine the date for this retreat when setting the calendar for the chapter. Typically, these retreats are held on an evening/day near the beginning of the semester/quarter after the transition retreat and the executive council retreat have taken place near the end of the previous semester/quarter in order to be more relevant to the timing of chapter events.

## Managing the Committee Chairs

*“Leadership is doing the right thing. Management is doing this right.”*  
-Warren Bennis and Burt Nanus

### The Motivator

*“Success doesn’t carry a dollar sign... Success isn’t something that just happens. Success is learned. Success is practiced. And then it’s shared.”*  
- Sparky Anderson

One of the principle roles of the external vice president is that of a motivator. The external vice president ensures the committees continue to run and function efficiently. As the committee chairmen monitor and evaluate their committee members, the external vice president is responsible for his chairmen. To keep these individuals motivated, one should remember the following points:

1. Posted/Distributed lists. Following weekly cabinet meetings, the external vice president could either post or distribute a list, detailing what each committee will be working on for the coming week. The list will help hold the chairmen accountable for meeting their weekly expectations.
2. Advance planning. Prior to each term following the chapter goal setting retreat, the executive council should prepare a tentative schedule of chapter events. The external vice president, working with his chairmen, could then develop and update a detailed schedule of the coming two weeks. This schedule could be posted or distributed at weekly meetings. This advance planning will help increase attendance to chapter events and avoid time conflicts between members.
3. Weekly committee and cabinet meetings. Committee chairmen should meet weekly with their committees prior to the weekly cabinet meeting of the external vice president. These meetings will help the chairman keep his committee focused on the goal for that week. Just as the external vice president rewards his chairmen, so should the chairmen reward their committee members. This could be accomplished by varying the meeting location and activities at the meeting (i.e. having pizza at the meetings, member of the week, etc.) By holding the committee chairmen accountable, the external vice president ensures the committees stay on task.
4. Written committee reports. After meeting with his committee, the chairman should prepare a brief report outlining the meeting for the external vice president each week. By doing this on a regular basis, the chairmen hold a vested interest in the committee’s progress.
5. Recognition, recognition, recognition. It cannot be stressed enough. Both the chairmen and the committee members need public displays of recognition. Motivating these individuals becomes one of the major roles of the external vice president. Remember criticizing in private. Praise in public. You cannot give too many awards. For example, the external vice president could establish a plaque for chairman of the month or year or hold an annual dinner for his cabinet.

### The Leader

*“A person always doing his best becomes a natural leader, just by example.”*  
- Joe DiMaggio

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*“The difference between a successful person and others is not a lack of strength, not a lack of knowledge, but rather a lack of will.”*

*- Vince Lombardi*

*“In order to be a leader, you have to know your job. You have to make people want to follow you, and nobody wants to follow somebody who doesn’t know where he’s going.”*

*- Joe Namath*

*“Contrary to the opinion of many people, leaders are not born. Leaders are made, and they are made by effort and hard work.”*

*- Vince Lombardi*

As an elected leader in the chapter, the external vice president will be faced with many tough decisions. It is expected that you do the right thing, even if it is unpopular. It should be noted that brotherhood and chapter unity should never be used as an excuse for failure to execute chapter policy. The external vice president may have to make difficult choices, to keep the chapter moving in the right direction.

### **The Enforcer**

It is important that the external vice president gets the maximum results from all his chairmen. It is the ultimate responsibility of the external vice president that the work assigned to each committee is accomplished according to the goals set by the chapter.

## **Execute the Plan for your Position**

### **During the Executive Council Meeting**

Every week there will be an executive council meeting. All members of the executive council should be in attendance for this meeting to discuss the business of the chapter. The purpose of the meeting is to ensure that all members of the executive council, essentially those who are running the chapter, clearly understand everything that is taking place that has to do with the chapter. It is important to have this meeting because the leaders of the chapter should always clearly understand what takes place within their organization. This also allows the leaders of the chapter to communicate a clear message to the rest of the chapter. By having all major decisions related to the fraternity worked out within the executive council, chapter meetings and overall chapter operations will run much smoother.

This meeting should take place at a time and day that will allow most members of the executive council to be in attendance. Determine this time and day at the first executive council meeting of the term. Typically, these meetings are held on either Sundays or Mondays before the chapter meetings by most chapters.

During this meeting, the secretary or president should have put together an agenda to follow in the meeting. Every executive council member will give their report during the meeting and each person should have a pad of paper to document any actions or items that arise from the meeting. Additionally, the secretary should take meeting minutes during this meeting to properly document what transpired. Dates of upcoming events should be documented and added to the chapter calendar. Once the meeting adjourns, the secretary should send the minutes of the meeting to all executive council members. Each officer should send their talking points to the secretary two days prior to the executive council meeting, to allow him to create an agenda for the meeting. It is also recommended that the alumni advisory board be in attendance and that minutes be sent to the alumni advisory board and the chapter advisor.

### **During the Executive Council Retreat**

During this retreat, the secretary or president or alumni advisory board chairman should have put together an agenda to follow in the retreat. Every executive council member, new and old, will give their report during the meeting and each person should have a pad of paper to document any actions or items that arise from the meeting. Additionally, the secretary should take minutes during this retreat to properly document what transpired and the goals that were set. Dates of upcoming events should be documented and added to the chapter calendar. Once the retreat adjourns, the secretary should send the minutes of the meeting to all executive council members and alumni advisory board members. Each officer should send their reports/goals to the secretary at least one week in advance of the executive council retreat, to allow him to create an agenda for the meeting and to ensure everyone has the proper paperwork prior to the retreat. It may be beneficial to bring the last year end summary report and consultant visitation analysis to assist with goal setting.

### **During the Transition Retreat**

During this retreat, every executive council member and chairmen, new and old, will discuss operations and go over in-depth details about each position, so each person should have a pad of paper to document any actions or items that arise from the meeting. Dates of upcoming events and any recommendations should be documented and added to the chapter calendar. It is important to ensure all reporting of new officers and paperwork with the university and the International Fraternity has

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been updated. Once the retreat adjourns, the new executive members and chairmen should have their file and documentation for the position as well as the knowledge from the previous executive member and chairman.

### **During the Chapter Goal Setting Retreat**

During this retreat, the secretary or president should have put together an agenda to follow in the retreat. Every new executive council member will report their goals during the retreat and each person should have a pad of paper or be given a list of the goals to understand all the goals that the chapter has. Additionally, the secretary should take minutes during this retreat to properly document what transpired and the goals that were set. Dates of upcoming events should be documented and added to the chapter calendar. Once the retreat adjourns, the secretary should send the minutes of the retreat to all chapter members. Each officer should send their reports/goals to the secretary at least one week in advance of the chapter goal setting retreat, to allow him to create an agenda for the meeting and to ensure everyone has the proper paperwork prior to the retreat.

### **During the Chapter Consultant Visit**

Each chapter will receive a chapter consultant visit once each academic year. During this visit, the designated chapter consultant, a member of the professional staff, for your region will visit your chapter. The chapter consultant will stay with you and your chapter for, typically, a three to five-day period. The consultant will meet with numerous members of the chapter including the entire executive council, each person who holds a position in the chapter, alumni of the chapter, university officials and the entire chapter. The consultant uses these meetings to find out more about the chapter to ultimately evaluate and provide recommendations to the chapter for better operations. This visit is by no means meant to be invasive or a method to cause issues for the chapter. It is simply a way for the international fraternity to help each chapter better itself through third party analysis and recommendations.

When the chapter consultant does come to visit your chapter, he will provide you with a preparation packet to help you properly prepare for his visit. It is important to be as helpful as possible when coordinating the visit with the chapter consultant since you should provide him with numerous items including chapter statistics, meeting times and locations for his meetings with chapter members, contact information for members in the chapter, meals for his visit, proper sleeping arrangements, and many other items. Make sure meetings are arranged with the chapter consultant to meet with all positions within the chapter. Again, it is important to complete the consultant preparation packet at least three days prior to the arrival of the chapter consultant. Ensure that the chapter consultant can conduct his business in a proper manner and that he is provided with plenty of other amenities to help the chapter as much as possible. The less hospitable and helpful you are toward the chapter consultant, the less likely he is to provide his best possible work and recommendations to the chapter.

Once the chapter consultant visit is finished, the consultant will then provide the chapter with a report that summarizes his visit known as the consultant visitation analysis. This document is meant to provide a snapshot of the current chapter operations while also communicating recommendations to improve chapter operations. This document is by no means used to score the chapter for awards, but it is simply a service that the chapter is provided in order to achieve a better overall fraternal experience.

## **Organize and Submit a Year End Summary**

Once an academic year, usually between March and June, an application is made available that is known as the Chapter Year End Summary and International Awards Application. This application is completed by chapters in order to qualify for international awards and to also provide a document that the chapter can use to evaluate and better current chapter operations.

The application is very long and includes four areas (membership, operations, brotherhood, and leadership) with each area containing four sub-sections. Each of these sub-categories contains five questions. Each question in the application asks for supporting documentation to prove that the actual task was fulfilled. Much of the work related to completing this application is due to the compilation of all the documentation and it will take many weeks to complete this process.

Therefore, in order to properly complete the year end summary, it is recommended that all members of the executive council be involved as well as any other member in the chapter who chooses to be involved. It will help to get more members involved with completing the year end summary since there is so much information to compile. It will be helpful to start on the application immediately when it becomes available and delegate each area as well as corresponding sub-categories to individuals involved with the process. Make sure that all final documents submitted are aesthetically pleasing and would be of a quality you or even your professors on campus would be proud of. The more you can delegate responsibilities and get more members involved with the process, the greater chance you have for submitting a better year end summary and qualifying for more international awards.

The chapter year end summary and international awards application can be found and completed through [www.pikes.org](http://www.pikes.org).

## **Enhance the Plan for your Position**

### **Review of the Program**

Once external operations have been completed for the year, it is important to get feedback from your committee chairs and any other member of the chapter that may be able to help better the external programming. This may be accomplished by numerous different methods.

It is important to get input from the external committee chairs since they were involved with the process. Hold a meeting with the committee chairs like normal and ask for feedback from the men. Also, announce in chapter meeting and over e-mail to the general membership that you would like to receive feedback about the external programming. You can communicate to the chapter members that they may submit recommendations through e-mail or on paper in person.

It may be beneficial during all discussions with members to list out discussion points of the external operations such as athletics, campus involvement, community service, public relations, social, and special events to ensure that feedback is constructive and on point. Make sure that all feedback is captured and documented so that it may be added to the external vice president documentation and the external programming may be improved in the future.

### **Ensure a Successful Transition for your Successor**

It is vital to the performance of your chapter that there is some transfer of knowledge to the next external vice president when your tenure is complete. This knowledge should be communicated in person and in writing through physical documentation.

The purpose of the physical documentation is to ensure that information is available for the new external vice president to easily reference during his tenure in the position. Documentation to include would be anything that could help your successor including but not limited to the external vice president handbook, agendas for meetings, documentation of previous external vice president issues, slideshows, e-mail correspondence, notes to successor, etc. Ensure that every event that is completed with the position has an accompanying event summary as well. This includes all committee chair meetings, any committee documents, pictures of committee activities, etc. Any activity that you organized and completed during your tenure as external vice president should have an accompanying event summary. A sample event summary can be found on page 32 of this handbook. A sample contact list can be found on page 33 of this handbook. A sample notes to successor can be found on page 34 of this handbook. Again, the physical documentation pertains to anything that would help your successor transition more easily into his new position, so please ensure the physical documentation is organized.

Once the physical documentation is compiled, then you will be able to sit down with your successor to have a transition meeting. During this meeting, you want to make sure to describe the overall position (including the purpose of the position, the goals, weekly tasks, semester/quarter tasks, successes and failures, recommendations) and detail the physical documentation. Communicate anything to your successor that will be helpful and may be difficult to understand in the physical documentation. It is beneficial to review the goals that you set as external vice president, to help the new external vice president set goals, and to discuss any points that may be of difficulty during his tenure or that affected you while holding the position. It also helps to include the alumni operations advisor in these meetings so that he can add his insight, advice, and ensure that external operations have consistency and develop

in the proper manner. Taking notes during this meeting will ensure that everyone is aware of what was discussed on the development of external operations.

You will ensure a successful transition for your successor if you are able to transfer physical documentation and conduct an in-person transition meeting. By ensuring proper transfer of knowledge takes place, the chapter will be able to continually develop better performing external operations.

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.

## Event Summary

Date \_\_\_\_\_

Event \_\_\_\_\_

Committee and Chairman \_\_\_\_\_

Description \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Steps in Planning

\_\_\_\_\_

\_\_\_\_\_

Needed Supplies, Cost, Attendance, etc., \_\_\_\_\_

\_\_\_\_\_

Persons to Contact, Addresses, Phone Numbers \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Suggestions for Improvement \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Your Name \_\_\_\_\_

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## Contacts

Phone \_\_\_\_\_

Name \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

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## Frequently Asked Questions

### **What if there is a chairman who doesn't do his job?**

It is your duty as external vice president to motivate chairman to accomplish their goals. This may mean that you must incentivize things or simply provide personal motivation to a member. It all depends on the chairman that you are dealing with at the time. If you are having difficulties motivating one of your chairmen or he is simply not fulfilling his duties, you may have to replace him. This should be a last resort since replacing the chairman will take a bit of time. However, this action should certainly be utilized if results are not being accomplished.

### **Do I have to hold in-person chairmen meetings?**

It is not required that you hold in-person chairmen meetings, but it is certainly helpful. The in-person meetings add accountability and they are more effective in informing everyone in the committee what is occurring within the committee. You can choose to try and communicate with each of your chairmen through email to accomplish the same results as an in-person meeting, but it will probably be more difficult and time consuming for you than simply holding an in-person meeting. You can experiment with whatever managerial practices you feel work best, but it is recommended as a best practice that you hold in-person chairmen meetings.

### **Can I have more chairmen than those listed in this handbook?**

Depending on your chapter operations, it is sometimes necessary to appoint extra chairmen to oversee responsibilities that are not outlined by other chapter positions. It is up to your discretion to choose whether you do or do not need more chairmen within your cabinet. It is important to understand that the more people you add in your cabinet, the more responsibilities and managing duties you will assume. It is recommended to appoint and work with the number of chairmen in this handbook since nearly all responsibilities will be accounted for, but the choice is ultimately yours to make.

### **How involved should I be with the work my committee chairmen do?**

You are the manager of the committee chairmen within your cabinet. It is not your responsibility to micro-manage them and complete tasks for them. Instead, it is your job to delegate responsibilities and motivate your chairmen to accomplish these tasks. You can help chairmen with duties if necessary but if they are actively forming and working with their committee members, there should not be a great deal of work for you to do. It is recommended that you try to manage effectively instead of spending your time working on tasks that are really the responsibility of your chairmen. It is important to utilize these recommendations in order to manage your time properly and maintain your other responsibilities.