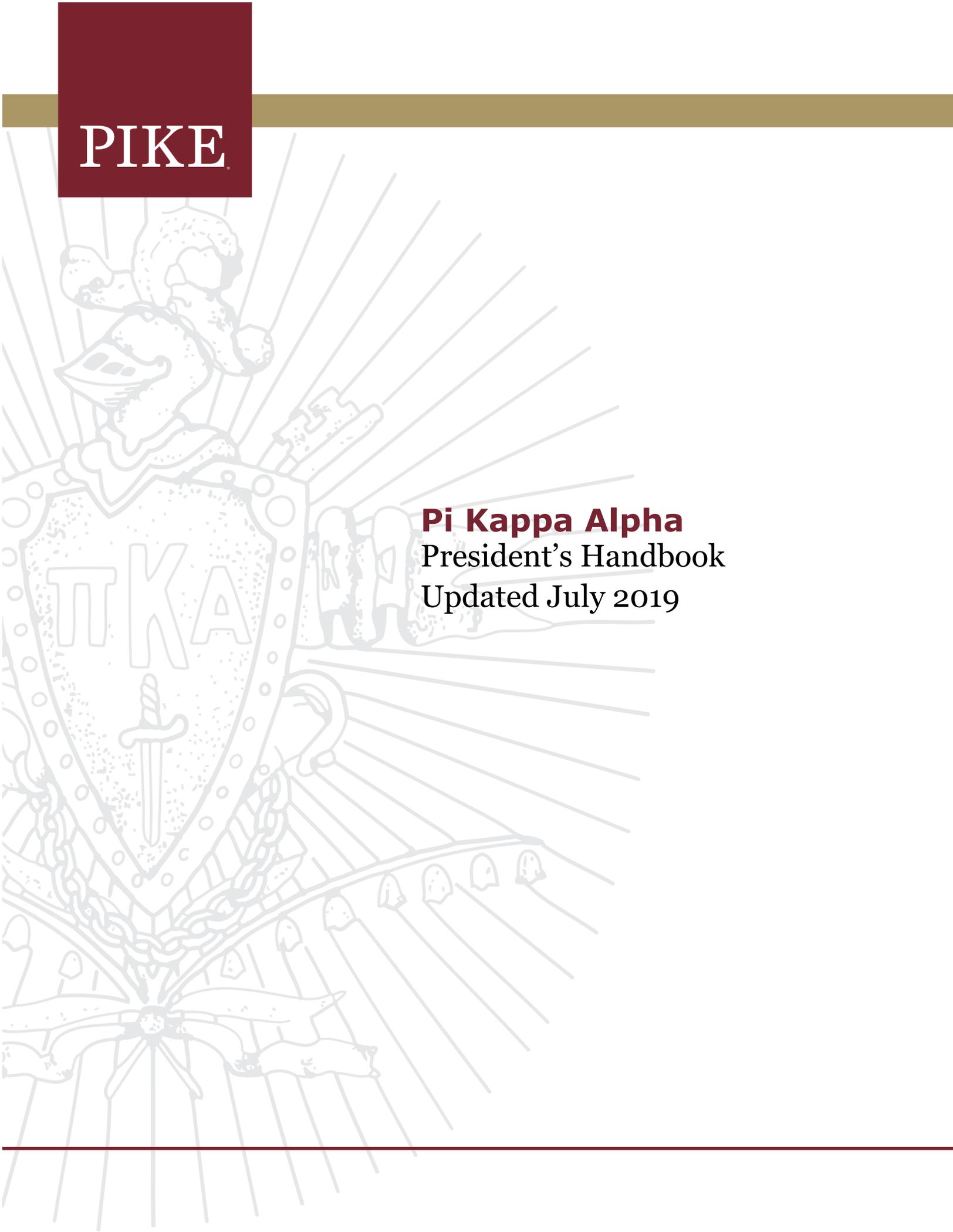


PIKE



Pi Kappa Alpha
President's 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 Fraternity for use by any chapter which is interested in establishing or improving its programming.

It should be understood that each chapter is self-governing and solely responsible for its day-to-day, week-to-week and month-to-month operation and nothing herein is intended as or should be deemed as supervision, direction, monitoring, oversight or as an effort to control the local chapter by the Pi Kappa Alpha 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 Fraternity.

This handbook is an educational guideline which only contains suggestions and recommendations developed by various chapters which were able to develop successful programs. It is published and available to any chapter through the clearinghouse in Memphis as a form of brotherly advice for whatever use one wants to make of it.

All ideas herein are optional, and nothing is mandatory. Participation is by the voluntary choice of each chapter and each member with the understanding that one generally gets out of something what one is willing to put into it. Thus, any language contained herein which could possibly be construed as “mandatory” such as “do this” or “do that” is only in the form of a recommendation that if one wishes to get the most benefit out of using the suggestions in the handbook, then the suggestions can be utilized with the understanding that any handbook is, at most, a guide and that the users should substitute their own experience and judgment to use, adapt or modify the suggestions and recommendations contained herein. In other words, the handbook is a guide 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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Introduction

While serving as chapter president, you will assume many different expectations and roles. With that in mind, it is important to maintain focus on the many tasks at hand, and truly represent the chapter to the best of your abilities. In no way is the role of chapter president intended to involve assisting in every area of operations for the chapter, nor does it include working endless hours while the general membership reaps the rewards of your hard work and endless efforts. On the contrary, if you want to develop the best chapter of Pi Kappa Alpha, you must learn many skills that will assist your chapter in becoming the best. Only with a combined effort of everyone within the chapter can the fraternity become successful and live up to its fraternal expectation of providing our members with the ideal undergraduate experience.

As the president of a fraternity, you will assume many different expectations that reach beyond maintaining the basic operations of a chapter. The university, local alumni, and the International Fraternity all look to you for strength and stability within the chapter. It is very important for a chapter president to recognize his role as a lead communicator for these groups and to use them as resources for information and guidance. As chapter president, people will look to you as the premier example of what Pi Kappa Alpha represents on your campus. The image that you present, as a result of your conduct, will have a direct effect on the image of your chapter. Overall, the role of chapter president is filled with many unique roles and expectations.

Aside from the many expectations and tasks of the chapter president, your position can be one of the most rewarding within the fraternity. You are now able to directly affect the chapter's performance and future. You can be a catalyst for positive change and provide direction for the chapter. Through your efforts and active leadership, your chapter can benefit and prosper with the legacy you leave behind.

As chapter president, what are my main expectations?

- To support and uphold chapter by-laws, the *Ritual* and *Constitution & Chapter Codes* of the Pi Kappa Alpha Fraternity
- To oversee chapter operations and general membership
- To manage crisis situations
- To promote positive relations with surrounding neighborhoods, the university, and Greek community
- To represent the chapter on a regular basis with university, community, alumni, and International Fraternity ambassadors
- To conduct a successful transition with successor

While serving as chapter president, you will work with many diverse groups within and outside of your chapter. Your role as chapter president involves maintaining constant communication with members of the fraternity and individuals who assist the chapter on a regular basis. Maintaining these crucial relationships is the foundation of developing a successful chapter and the ideal fraternity experience.

What information do I need for my chapter president resource binder?

- Chapter President Overview
- Chapter President Supplemental Resources
- Written Sample Program
- Chapter Retreats

Tips for Becoming a Successful Chapter President

The following are a few suggestions that will assist you in your efforts to becoming a successful chapter president:

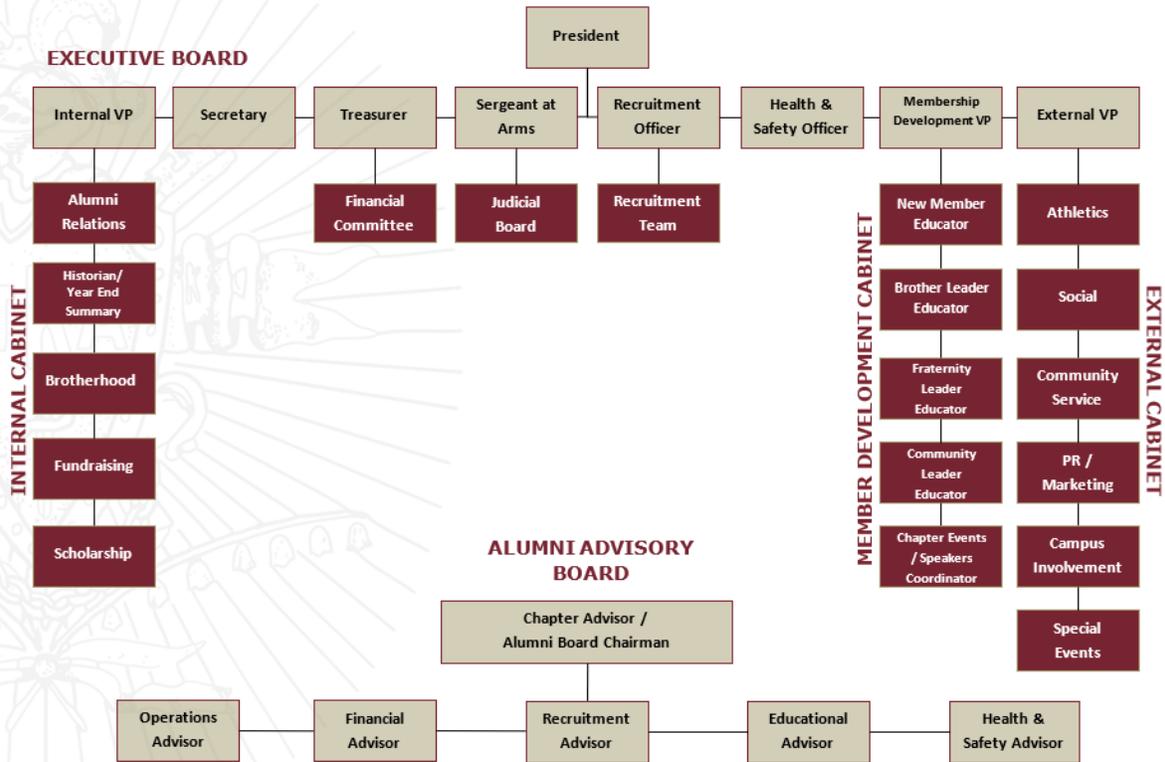
1. **Lead and motivate by example.** While chapter president, always strive to represent the highest ideals of appropriate conduct for all members of your chapter. Since you are the foremost representative of the fraternity, people will tend to model their behavior after the example you provide.
2. **Utilize your resources.** Local alumni (chapter advisor, alumni advisory boards, house corporations), university officials (Greek Advisor, Dean of Students, Student Government), professional staff (www.pikes.org), Leadership Summits/International Conferences and Conventions, regional presidents, and chapter consultants are all great resources that are readily available to assist you on a daily basis.
3. **Utilize your executive council.** Use the executive council to review the progress and operations of the chapter to make certain that everything is being accomplished. This makes for a great forum to discuss issues within the chapter, as well as to delegate tasks amongst chapter officers.
4. **Stay consistent.** A large responsibility of being a chapter president involves the ability to maintain impartiality. In order to be successful and impartial, you must stay consistent with decision-making and judgments of members' behaviors. No respected leader is ever accused of being a hypocrite.
5. **Be Accessible.** At times, problems or situations can be resolved with immediate intervention. Being easily accessible allows a chapter president to build better relationships with all members of the chapter, and in turn, will put you in a better position to assist with any chapter conflicts.
6. **Learn from your mistakes.** Nobody is perfect, so recognize that not everyone will make the right decisions all the time.
7. **Recognize your own personal shortcomings and strive to improve in those areas.** For example, if you have problems managing your time, make sure you are delegating tasks to the appropriate officers or chairmen, and continue staying organized with the assistance of a daily planner or calendar.
8. **Take a personal interest in members.** Keeping members motivated is a constant battle. By taking a personal interest in the different activities of the members, the chapter president will be better suited to encourage the efforts of chapter members and can better motivate brothers to be active contributors in the fraternity.
9. **Help others solve their problems.** To encourage friendship and accountability within the chapter, assist others with solving problems. Provide advice, but don't intervene to solve the problems for them.
10. **Delegate responsibilities and tasks, then trust the outcome.** Delegation is the key to success with any organization. The ability to delegate, and accept the subsequent outcome, is essential for the successful management and operations of a chapter.

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The Chairman/Committee Structure

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ORGANIZATIONAL FLOWCHART



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Chapter Organization

A fraternity chapter is an extremely complex organization to operate, and one man cannot be expected to manage it alone. With this in mind, your most valuable source of assistance is the executive council. In order to have consistently successful events, these activities require excellent planning that is performed well in advance. Therefore, in order to be a consistently successful chapter, someone has to plan in advance. The executive council is charged with this basic expectation.

A great deal of flexibility is permissible with the composition of the executive council, but there are several standard members that are suggested to be involved: the chapter president, vice presidents, treasurer, secretary, sergeant-at-arms, recruitment, health & safety, membership development VP, and chapter advisor. The following is a brief summary of some expectations for all chapter officers and committee chairmen:

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Vice President (Internal & External): performs the duties of the president in his absence; is in charge of overseeing all committees; serves as personal representative of the executive council; reports to the executive council on the functioning of each committee; holds weekly meetings with all committee chairmen to assess the progress and goals of each chairman; upholds and is familiar with all chapter by-laws, *Constitution & Chapter Codes*, and university policies or procedures; assists in the facilitation of chapter goal setting and transition retreats.

Treasurer: develops an extensive chapter budget complete with separate accounts for housing, kitchen, and general expenses; submits monthly budget statements to the chapter; collects all dues and fees associated with membership; appoints a chapter finance committee; files and saves all receipts; attains services for an annual audit; completes the annual IRS 990 form; develops membership contracts for all members.

Secretary: reports all new members and initiations to the International Fraternity; keeps an accurate and detailed roster of chapter members and new members; keeps a record of minutes for all chapter meetings; orders all necessary materials from the International Fraternity.

Sergeant-at-Arms: maintains order during chapter meetings; oversees all ritual ceremonies; prepares the chapter room for meetings; stores and cleans all regalia; supervises the chapter judicial committee; serves as the chapter's ritual educator; upholds and is familiar with all chapter by-laws, *Constitution & Chapter Codes*, and university policy or procedures.

Vice President of Membership Development: primary organizer and overseer of the chapter's holistic member development program, the *True PIKE Experience*, including staffing the member development cabinet, budgeting, curriculum revision or development, and member involvement based on the True Pike.

Recruitment: develops a budget detailing the estimated expenses for the upcoming term; emphasizes a year-round recruitment philosophy amongst the chapter; coordinates workshops and retreats to promote recruitment; develops and maintains an extensive record keeping system to document all information on potential members; coordinates a summer recruitment program to target potential members; develops a recruitment scholarship program; appoints a recruitment committee with recruitment captains; assists the recruitment committee in developing the chapter's rush manual; coordinate sorority presentations; has the final say in bid process; assists the new member educator in conducting rush evaluations.

Health & Safety Officer: develops a comprehensive chapter health & safety program along with the risk awareness policy to be submitted to the chapter for approval and implementation; ensures that the chapter is educated and adheres to the *Standards, Constitution & Chapter Codes*, and university policies or procedures; oversees and informs the membership of the crisis management plan; proactively educates chapter members on issues affecting fraternity and Greek life.

Chapter Advisor: meets weekly with the chapter president and executive council to discuss progress and issues within the fraternity; attends chapter meetings once a month; assists the chapter in times of crisis; maintains constant communication with the chapter for purposes of providing insight and advice in programming areas; attends many chapter events; serves as a direct representative of the chapter with university and community officials; operates as a liaison with the professional staff.

With the assistance of a strong executive council, the chapter as a whole will be better suited to develop into a successful fraternity. Furthermore, the chapter president will have more time to dedicate toward

motivating chapter members and improving public relations, instead of performing the duties and tasks of other chapter officers and committee chairmen.

Further Explanation of the Job's Overall Theme

The Basics of Planning and Management

"The Pitchfork Method"



Using the right tool is essential to getting a job done in both a competent and expedient manner. The pitchfork is a unique, yet simple instrument designed to effectively penetrate the subject matter and empower the user to utilize leverage and balance to efficiently accomplish the task. The three-pronged fork minimizes resistance, focusing on the essential elements for an effectively distributed load. The handle provides leverage, enabling the optimization of output in a controlled fashion. The result is maximizing efficiency to achieve a goal.

This analogy is applicable to the planning and management of any organization, especially a fraternity chapter and its individual committees. The prongs represent a set of goals, a budget to support those goals, and a skeleton calendar for the respective period. The prongs by themselves only make a partially effective tool; with good communication, you have a handle that enables the prongs to fully serve their purpose.

Ideally, the chapter would set its goals at a chapter retreat. Immediately upon the appointment of a committee chairman, prior to the start of the next school term, he alone or with his committee should create a draft of the committee's goals, budget and calendar for the coming school term. Officers should do the same for their term in office. All chairmen should then submit their proposed goals, budget and calendar to their respective vice president. Prior to the start of the next school term, the officers and key committee chairmen should hold a business meeting at an "executive planning retreat" with the objective of producing a compiled set of goals, a comprehensive chapter budget, and at least a skeleton calendar for the upcoming school term. This requires everyone to think about what they want to do, how much it will cost to do it, and when they want to do it. If adjustments to a committee's proposed plan are required based upon limited resources or conflicts with the schedule, those attending the executive planning retreat could decide as a group what should be done; this builds consensus and support among the leaders and "Doers" of the chapter which translates into momentum and synergy as the school term begins.

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That which is adopted at the retreat should be documented and given to every member at the first chapter meeting of the school term. Documentation is essential to long-term continuity and the progressive improvement of any program and the chapter overall. If every member has the plan for the term in his hands, all excuses of "I didn't know" are eliminated. A brothers' manual or handbook is an excellent vehicle to convey this information. Being organized helps motivate the entire chapter as well as committee members. The creation of a game plan before school starts allows the officers and chairmen to focus on execution of the plan and leading the chapter through a successful term. Please consider the following outlined explanation:

FIRST PRONG - GOALS (CHAPTER/COMMITTEES/OFFICERS)

See Sample Strategic Planning Supplemental Resource

- Short term goals (to be accomplished during term in office)
- Long-term goals (to be accomplished beyond term in office)
- Remember any overall goals set by chapter
- Develop objectives and strategies for accomplishing goals
- Chairmen propose their goals - submit to their vice president

SECOND PRONG - BUDGET

- Chairmen propose budget to support their goals - submit to their vice president
- Think about both short and long-term goals and needs
- Budgets finalized at executive planning retreat, including chapter's overall budget

THIRD PRONG - CALENDAR

- Chairmen propose their calendars - submit to their vice president
- At a minimum, create a skeleton calendar for the entire chapter at the executive planning retreat
- Include pertinent events on school and local community calendar

THE HANDLE - COMMUNICATION (essential to execution and holding people accountable)

With Whom

- Chapter
- Executive council
- Chapter advisor and alumni advisory board
- International Fraternity and professional staff
- University
- IFC
- Community

Chapter Goal Setting Retreat

- Held at strategic time during school year to maximize motivation
- Keep business attitude but have fun scheduled in
- Be organized
- Assess strengths and weaknesses
- Do short and long-term goals for chapter - be general

Executive Planning Retreat

- Chapter officers and select chairmen
- Held prior to the start of school term
- Remember the chapter's goals
- Goals, budget and calendar are established for committees and the chapter

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Brothers Manual / Handbook (a documentation tool and excuse eliminator)

- Prepare each school term
- Include goals, budget and calendar as created at executive planning retreat
- Hand out at first meeting of school term
- Also include officer and chairmen list, permanent and school phone and addresses, by-laws, other
- Chapter policies and rules, list of due dates, etc.

Committee and Officer Handbooks (essential documentation tools)

- This is the documented program
- Include current and past goals, budget and calendars
- Include event planning sheets of current and past projects
- Include advice to future chairmen and officers
- Include other helpful information that also appears in brothers' manual

Other Communication Tools

- Chapter website
- Chapter social media / other online tools
- Weekly executive council meetings
- Committee meetings
- Chapter meetings
- Voicemail line with a recorded daily/weekly message
- Chapter- membership email / newsletter (weekly or monthly)
- Chapter- summer and winter break email / newsletter
- Emergency phone tree and crisis plan (include in brothers' manual)

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Components of Job Function

The chapter president is the most important and crucial position for the success of Pi Kappa Alpha. He should have total control and understanding of the internal and external workings of the Fraternity. The chapter president has many duties and obligations to the Fraternity; leadership, role model, mentor, problem solver, upholder of laws and regulations of the Fraternity, and overseer of daily operations. The ability for the president to delegate, set the chapter up for success, and execute the chapter's needs and wants while keeping the best overall interest in mind is also extremely important. The chapter president's actions should be exemplary of how the general membership conducts itself. The chapter president should also create and uphold the vision and direction of the Fraternity. The chapter president and his resources are what will make this chapter successful.

Focus Areas

- Chapter membership
- Alumni
- Parents
- University
- IFC
- International Fraternity
- Community
- Other Greek organizations
- Student population

Chapter President Duties

- Know and understand the *Constitution & Chapter Codes*, chapter by-laws, and university policies for student organizations and fraternities
- Review and update the chapter presidents handbook
- Inform the university Greek advisor/dean of students of your election to the position
- Organize a meeting to discuss chapter goals and objectives for the upcoming semester
- Notify and inform the local alumni association/house corporation president of the chapter's progress throughout the academic year
- Meet weekly with the chapter advisor to discuss the progress of the chapter
- Review and read the Fraternity *Standards* to the chapter, sign appropriate forms, and return them to the International Fraternity (refer to APPENDIX)
- Organize and hold an executive council retreat and general chapter membership retreat.
- Set personal goals for your term as chapter president as well as those for the executive council and chapter
- Assist the continuing education chairman with the transfer of officer and committee handbooks and materials
- Conduct weekly chapter meetings and executive council meetings to discuss and monitor progress of the chapter
- Attend every chapter event, including community service, philanthropy, athletic, social, and otherwise; the president should have the best attendance of any member whenever possible.
- Attend necessary university/Greek community meetings
- Plan and coordinate ritual ceremonies, such as initiation and graduation ceremonies
- Supervise the completion of appropriate documentation by the secretary and treasurer throughout the academic year (refer to APPENDIX)
- Organize the chapter consultant visit
- Submit the Year End Summary and Awards Application to the International Fraternity by May 15
- Attend Leadership Summits and The Academy/International Convention
- Facilitate presidential transition with a one-on-one meeting and continued contact with the newly elected president throughout his term.

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- Delegate responsibilities so that you are not overwhelmed. Put the correct people in the correct positions to make the chapter successful.
- Assist with overseeing the Health & Safety program, Health & Safety and social chairmen, and all events with possible risk. Know the procedures for potential risky situations and educate the chapter on what to do in them.
- Be prepared and knowledgeable for every potential situation.
- Represent the Fraternity in the best way possible. Your actions will dictate people's opinions of your chapter and you must BE ON AT ALL TIMES.

Leadership

- Lead-by example
- Be a role-model
- Know the difference between leadership and management
- Be a mentor and teacher to **chairmen, general membership, and new members**
- Instill will
- Interaction, participation, and accessibility on all levels of the "area of focus and representation"
- Be visible on all levels of the "areas of focus and representation"
- Be a motivator
- Organization is key to success
- Uphold the image and direction of Pi Kappa Alpha
- Show recognition
- Promote brotherhood and unity throughout Pi Kappa Alpha and the Greek community
- Be consistent with all decisions
- Empower others to make decisions, people will support what they create

Meetings

- 4/5 chapter meetings should be ritual; ritual should be memorized
- *Robert's Rules of Order* is used at every meeting
- Have a well thought out agenda
- Limit discussion and eliminate non-productive time periods
- Meetings should last no longer than one and one half-hour
- Do most, if not all, of the thinking and planning of events in the executive council and committee meetings
- Meetings should be held at a consistent time and place

Resources and Contact Lists

University resident and Greek life
 Public safety
 Police
 Hall director
 Legal adviser
 Professional staff: www.pikes.org 901-748-1868
 Regional president
 Chapter advisor

Chapter Consultant Visit

- Notify the chapter at least two weeks in advance when the chapter consultant will be visiting.
- Inform and prepare all members who will need to meet with him during his visit and set up an agenda of meeting times prior to his arrival.
- Set up all meetings with the Greek advisor, chapter advisor, house corporation president, and any other necessary meetings prior to his arrival.

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- Set time to eat and assign a member to accompany the chapter consultant during meal times.
- Assemble a three-ring binder with all pertinent information: typed out agenda, phone list, budget, chapter history, new member manual, newsletters recently published, chapter goals, etc., to be given to the chapter consultant upon his arrival.

Executive Council Meetings

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.

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.

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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.

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.

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 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.

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.

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.

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 Memorial Headquarters 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 is able to 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.

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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. Most 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.

Chapter President Checklist

Immediately Following Election:

- Meet with outgoing president to discuss transition
- Meet with chapter advisor to discuss chapter goals and objectives for the upcoming semester
- Review chapter presidents handbook
- Inform university Greek advisor/dean of students of your recent election to the position and organize a time to discuss chapter goals and objectives for the upcoming semester
- Notify local alumni association/house corporation president of newly elected officers
- Review *International Constitution & Laws, Chapter Codes*, chapter by-laws, and university policies for student organizations/fraternities

Within Two Weeks of Election:

- Hold executive council retreat to discuss and set up goals for the year
- Appoint new officers / committee chairmen and delegate responsibilities
- Organize and assist in the facilitation of an officer training retreat
- Set personal goals for your term as chapter president
- Review the Fraternity *Standards* with the chapter, sign appropriate forms, and return them to the International Fraternity (APPENDIX)

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- ❑ Assist the continuing education chairman with the transfer of various officer and committee handbooks/materials

Weekly Tasks:

- ❑ Conduct weekly chapter meetings
- ❑ Conduct weekly executive council meetings to monitor progress of the chapter
- ❑ Meet and communicate with the chapter advisor
- ❑ Attend all possible chapter events and functions. Motivate other members' attendance as well
- ❑ Attend chapter events and necessary university/Greek community meetings
- ❑ Ensure the secretary is sending out weekly notices of the chapter's activities

Monthly Tasks:

- ❑ Review chapter and personal goals
- ❑ Review and get updates on the budget with the treasurer, recruitment with the recruitment chairman, and new member education with the new member educator.
- ❑ Plan for and review next month's chapter calendar
- ❑ Meet with university Greek advisor/dean of students

Semesterly/Quarterly Expectations:

- ❑ Contact the regional president to inform him of the chapter's progress
- ❑ Plan and coordinate Ritual ceremonies, such as initiation and graduation ceremonies
- ❑ Supervise the completion of appropriate secretary and treasurer forms/payments

Annual Expectations:

- ❑ Organize the chapter consultant visit
- ❑ Submit Year End Summary and Awards Application to the International Fraternity by May 1st
- ❑ Attend Leadership Summit and The Academy/International Convention
- ❑ Maintain sound risk awareness and Health & Safety practices and continually educate the chapter on best practices
- ❑ Stay motivated by attempting to achieve the goals you set at the beginning of the year. Do not lose focus or make excuses
- ❑ Leave the chapter in a better position than when you found it and set up the next president for success

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Planning the Annual Calendar

Assuming November / April elections

Early Summer

- Schedule date for goal-setting and planning retreat.
- Get vice president to set calendar
- Create a tentative calendar – ensure all venues are secured
- Make arrangements to create and update chapter budget.

Late Summer

- Set goals
- Give a tentative calendar to vice presidents and chapter
- Submit estimated budget (itemized list)
- Assist with recruitment plans
- Delegate and assign duties
- Set committee goals
- Hold committee meetings (as needed)
- Make sure continuing educator is making membership manuals

August

- Finalize recruitment program; membership manuals
- Make arrangements with the secretary to order Garnet & Gold manuals and new member pins
- Set up meeting with Greek advisor to inform them of the chapter's goals.
- Plan and hold a brotherhood goal setting retreat for the beginning of the year

Fall Semester

- Assist rush chair and committee
- Make sure secretary updates roster
- Meet with new member educator to finalize program

- Hold executive meetings weekly
- Hold chapter meetings weekly
- Meet with Greek Advisor every two weeks.
- Be in weekly contact with chapter advisor
- Inform chapter of upcoming events
- Plan and conduct brotherhood and rush retreats

November

- Initiation
- Elections for new officers.
- Transition retreat with new officers.
- Overview previous year at executive council transition meeting. Analyze goals achieved and missed and opportunities for upcoming year.
- As new president, hold an executive council retreat and set goals for upcoming semester and year

Spring Semester

- Assist rush chair and committee
- Make sure secretary updates roster
- Meet with new member educator to finalize program
- Hold executive meetings weekly
- Hold chapter meetings weekly
- Meet with Greek advisor every two weeks.
- Be in weekly contact with chapter advisor
- Inform chapter of upcoming events
- Plan and conduct brotherhood and rush retreats
- Initiation
- Prepare for completion of year-end summary and delegate duties
- Prepare transition with new officers (if applicable)

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Practical Leadership

While serving as president, the chapter will look to you for guidance and direction. Effective presidents are respected leaders that instill confidence in those around them. As the top representative of Pi Kappa Alpha, people outside the fraternity recognize you as the leader of the organization. Your personal appearance, image and behavior play a tremendous role in how others perceive the chapter. The following are principles of sound leadership that can help you during your tenure as chapter president.

1. Be neat, clean, organized and disciplined
2. Dress appropriately for different situations and chapter events
3. Maintain a positive attitude
4. Work to further develop your written and verbal communication skills
5. Make an effort to talk with everyone in the chapter on a regular basis and avoid aligning yourself with one particular group
6. Motivate others by recognizing outstanding contributions and efforts by individual members
7. Remember that people tend to support what they help to create
8. Realize that one man cannot successfully run the chapter alone
9. Delegate duties and responsibilities to executive council and chapter members on a regular basis
10. Learn how to manage your time in order to balance school work, fraternity responsibilities and other interests (i.e. organize a to do list, do not procrastinate, prioritize, schedule time for planning every day, etc.)
11. Avoid burnout by developing a strong support network of close confidantes
12. Pursue regular activities outside the Fraternity (i.e. exercise, hobbies, etc.)
13. Make a conscious effort to spend time away from the fraternity-take a break

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Difficulties of Being President

Many situations can arise that will effect your overall performance as a chapter president. Some examples of situations and conflicts that may exist during your term as chapter president can include:

- Conflicts between brotherhood and following fraternity and/or university policies
- Resolving sensitive situations within the chapter
- Understanding the appropriate role of the chapter president
- Recognizing that one man cannot make a successful chapter by himself
- Maintaining high levels of enthusiasm and standards for appropriate conduct
- Being flexible with your schedule

The above examples may negatively affect your performance as chapter president, but can be managed successfully. Your ability to control these distractions effectively will positively impact your term as chapter president and provide you with the ideal chapter president experience. However, the ability to diffuse any situation involves the further development of many necessary skills. Some suggestions for developing these skills are as follows:

1. Lead and motivate by example
2. Utilize your executive council
3. Stay consistent
4. Be accessible
5. Learn from your mistakes
6. Recognize your own personal shortcomings and strive to improve in those areas
7. Take a personal interest in members
8. Help others solve their problems
9. Delegate responsibilities and tasks, then trust the outcome
10. Utilize your resources

Characters to Watch Out For

1. **The “Antagonist”** – Disagrees with the leader and does everything possible to make his stance known, making a conscious effort to turn others against the leader and sabotage the leader’s plans.
2. The **“Waste of Space”** – Sits at the meeting nodding his head, but obviously doesn’t care what’s going on. May accept assignments, but never actually follows through.
3. The **“Yes Man”** – Goes along with the plan simply because the leader told him to but doesn’t put a lot of effort into the project.
4. The **“Team Player”** – Will go along with whatever everyone else wants to do but takes no ownership.
5. The **“Wannabe”** – Wants to contribute but lacks the experience/skills to contribute without supervision.

How Can These Characters Be Used Effectively?

1. **Education** – Eliminate the “need to know” basis and explain the “big picture.” By educating the members, they may not agree with your decision, but they will understand why you felt it was important.
2. **Buy-In** – They understand the reasoning behind the decision and support it.

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3. **Internalization** – The members not only support your decision, but feel it is the decision they would have made also. They take ownership of the decision and feel a personal attachment to the success of the goal.

Tips for Successful Meetings

Tips for Effective & Efficient Executive Council Meetings

- Meet regularly and frequently (i.e. every week, same time, etc.)
- Follow a regular agenda
- Meet privately, not secretly
- Plan chapter events (i.e. review chapter calendar, consult last year's president's notebook/calendar, plan agenda for upcoming meeting)
- Follow a business meeting format
- Have vice president's forward brainstorming to committee heads, not the executive council
- Discuss sensitive issues effecting the fraternity
- Plan upcoming chapter meeting

Tips for Effective and Efficient Chapter Meetings

- Follow the same written agenda for each meeting
- Use and know *Robert's Rules of Order* (refer to *Garnet & Gold Reference Manual* for parliamentary procedure information)
- Speak only when required
- Be authoritative, not the authoritarian
- Keep meetings to a one hour time limit
- Always follow chapter by-laws and *Constitution & Chapter Codes*
- Present voting options to the membership
- Utilize the sergeant-at-arms role as main conductor of the meeting
- Use and memorize applicable ritual

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Sample Meeting Agenda

Meeting Agenda # _____

Week of _____

General Topics to be Covered for this Meeting:

1. _____
2. _____
3. _____
4. _____
5. _____

ORDER OF BUSINESS

- I. Call to Order – President
- II. Pi Kappa Alpha Invocation -Ritual
- III. Roll Call
- IV. Minutes of previous meeting
- V. Committee Reports
- VI. Old Business
- VII. New Business
- VIII. Education (Discussion, Speakers)
- IX. Schedule of weekly events
- X. Open Forum – pass the gavel
- XI. Close Meeting - Ritual
- XII. Adjourn

Special Activities for this Week:

DATE	ACTIVITY	TIME	PLACE
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_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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Supplemental Resources

Additional resources a chapter president should maintain as separate tabs in their handbook may include:

- Fraternity *Standards*
- Position on Hazing
- Strategic Planning
- Leadership IQ
- Creating A Personal Mission Statement
- Sample Press Releases
- Crisis Management Procedures
- Incident Report Form
- Chapter Financial Policies
- Definition of the Relationship Between The Fraternity and Chapters affiliated as The Pi Kappa Alpha International Fraternity
- Sample Chapter Retreats
- Chapter By-Laws
- Chapter Judicial Procedures
- Sample Chapter Program

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Conclusion

The chapter president plays a vital role in the overall success of a chapter. When his tasks are performed well, consistent communication is achieved with university officials, alumni, and chapter members. With the aid of a strong executive council, the chapter president is able to dedicate more of his efforts toward improving public relations on campus, motivating chapter members, and organizing comprehensive goals and strategies for the chapter. In addition, the chapter may see an improved relationship with local alumni, other Greek organizations, campus officials, and surrounding communities. Finally, all areas of chapter programming will be improved because the chapter president will be more accessible to provide insight and advice to chapter officers, committee chairmen, and general members. The success of your chapter's recruitment, financial management, public relations, and continuing education programs are all dependent upon the strategic leadership and planning of the chapter president.

The chapter may suffer numerous consequences because of an irresponsible president. First and foremost, the chapter may become inconsistent in all areas of programming. With an unorganized and unmotivated chapter president, the education of members on the importance of leadership and involvement within the chapter will be lost. The relationship with university officials, alumni, and other various resources may become jeopardized. The chapter could become negatively represented on campus because public relations efforts will be nonexistent. Finally, the chapter will lack direction for the future, which will result in the poor planning and organizing of chapter events or programs. This lack of planning may threaten the long-term status of the fraternity, create conflicts within the membership, or increase levels of financial instability.

As chapter president, you should take pride in your position. Now that you are the lead spokesman of the chapter, you can improve many chapter-programming areas, and more importantly, are charged with upholding the ideals of Pi Kappa Alpha. This, above all, is the ultimate expectation of every chapter president.