

PIKE



## **The Alumni Advisory Board**

Outlining the Ideal Alumni  
Advisory Board

Updated February 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 which is interested in establishing or improving its programming.

It should be understood that each chapter is self-governing and solely responsible for its day-to-day, week-to-week and month-to-month operation and nothing herein is intended as or should be deemed as supervision, direction, monitoring, oversight or as an effort to control the local chapter by the Pi Kappa Alpha International Fraternity, which is a fraternal affiliation of over 220 chapters and colonies, over 14,000 active undergraduate members and over 280,000 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 only which contains suggestions and recommendations developed by various chapters which were able to develop successful programs. It is published and available to any chapter through the clearinghouse in Memphis as a form of brotherly advice for whatever use one wants to make of it.

All ideas herein are optional and nothing is mandatory. Participation is by the voluntary choice of each chapter and each member with the understanding that one generally gets out of something what one is willing to put into it. Thus, any language contained herein which could possibly be construed as “mandatory” such as “do this” or “do that” is only in the form of a recommendation that if one wishes to get the most benefit out of using the suggestions in the handbook, then the suggestions can be utilized with the understanding that any handbook is, at most, a guide and that the users should substitute their own experience and judgment to use, adapt or modify the suggestions and recommendations contained herein. In other words, the handbook is a guide from which the users can use to establish, improve or build their own programs, using their own knowledge, common sense, ideas and experience and to assist the users from time to time as a reference for ideas and suggestions. In turn, each chapter is encouraged to share good ideas with other chapters by advising the administrative clearinghouse for possible inclusion in future publications.

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# The Pi Kappa Alpha Advisor

## The Advising Concept

Whether you are currently serving as a chapter volunteer, or considering serving Pi Kappa Alpha in this valuable capacity, welcome! This reference has been created to provide chapters and alumni with an overview of the roles of the chapter advisor and alumni advisory board. It is not an instructional manual, and cannot provide answers for every situation, but it is designed to give you an overview of the team advising concept embraced by Pi Kappa Alpha.

At the 2018 International Convention in Richmond, Virginia, delegates passed a resolution that updated the Fraternity's *Standards* to require each chapter to have an alumni advisory board. This *Standard* was not meant to be punitive but rather to encourage our chapters, alumni bases, and officers to construct an advisory board that will support their respective chapter.

Overall, the most common characteristic of Pi Kappa Alpha's award-winning chapters – those that perennially are the most competitive on their campus – is the presence of an effective advisory team!

While experience supports the need and value of an advisor, it is not always easy to find student member acceptance for an advisor. Sometimes this is due to the misconception that an advisor is in some way a “manager” or “parent”. In other cases, a chapter may simply be reluctant to consider new and challenging ideas. There is no easy remedy in these situations. Successful advisor - chapter partnerships can only be achieved after taking the time to build a relationship based on trust and mutual respect.

## The Advisor – Chapter Relationship

The Fraternity created a task force to study the issue of chapter advising. As part of their research, they evaluated many of our most successful advisors – chapter partnerships. Their research found that almost all of those relationships shared the following common characteristics.

- ◆ The advisor and the chapter are genuinely dedicated to the Fraternity's Vision, Mission and Creed; they both are committed to meeting and exceeding the Fraternity's policies and expectations.
- ◆ The advisor is a graduate with at least five years of separation from his student involvement; he is a professional and community leader; he is a mature mentor for the chapter. The chapter doesn't expect the advisor to act like a student member; the members treat him with respect.
- ◆ The advisor understands the importance of advising and mentoring, not managing or directing; he understands that failure and learning from mistakes is as important to the fraternity experience as is success and winning. The chapter is committed to success, the members understand that they are solely accountable for their actions and that failure to heed the lessons of their failures will jeopardize the advisor – chapter relationship.
- ◆ The advisor is accessible and has contact with the chapter leaders at least weekly; he is willing to reach out and partner with the Fraternity's regional president and professional staff; he attends the annual Leadership Summit and International Convention. The chapter respects the limited amount of time available from the advisor; the chapter leaders assist in the development and support of an advisory board.

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# The Alumni Advisory Board

## Role

The most effective advisors are typically part of a team. The creation and maintenance of an alumni advisory board is beneficial for the chapter and alumni volunteers. For the chapter, it offers more perspectives and expertise than one alumnus could possibly provide. For alumni, it makes advising a much more manageable and enjoyable experience.

An alumni advisory board usually consists of alumni members who can offer the following:

- ◆ Their professional expertise and support to the undergraduate chapter
- ◆ A commitment to helping the chapter improve
- ◆ Counsel and advice to chapter leadership
- ◆ Assistance in the areas of academics, leadership, undergraduate recruitment, and financial management
- ◆ Emphasis on the intangible aspects of fraternalism – Ritual, brotherhood, motivation, unity and caring for one another
- ◆ Up-to-date progress on new ideas, tools, and fraternal programs

## Structure

Ideally, there are at least six key members of the alumni advisory board. Many times, the chapter advisor will chair the board, but may rotate this responsibility amongst the members. The advisory board shall set regular meetings strategically throughout the semester. Times of the year to target are early fall, early winter, early in the new year, and late spring before graduation. Early in the planning process, they should also establish roles for each chairman, examples are below.

## Chapter Advisor / Advisory Board Chairman

### *Sample Roles as Advisory Board Chairman*

- ◆ Help establish vision, mission, and expectations of the board
- ◆ Serve as a liaison to the alumni advisory board, coordinating proper communication between the advisory board and chapter executives
- ◆ Facilitate semesterly goal setting and monitor progress of board as it correlates to the Chapter Specific Strategic Plan
- ◆ Organize and lead quarterly meetings of the advisory board
- ◆ Communicate regularly with members of the advisory board via phone and email

### *Sample Roles as Chapter Advisor*

- ◆ Serve as a resource to the chapter president and mentor to chapter members
- ◆ Maintain regular communication with the regional president
- ◆ Provide general assistance and guidance for chapter programs and operations
- ◆ Attend weekly chapter meetings on a regular basis (or as necessary)
- ◆ Serve as a liaison to the university, alumni association, and house corporation
- ◆ Assist in the development of the officer transition retreat
- ◆ Provide suggestions and input at executive council meetings
- ◆ Monitor chapter's progress towards becoming an *Excellence Chapter*
- ◆ Ensure a successful transition

## Operations Advisor

### *Sample Roles*

- ◆ Serve as a resource to the internal and external vice presidents
- ◆ Assist the vice presidents with management and goal setting for their respective committees
- ◆ Attend a committee meeting on a monthly basis
- ◆ Present to the chapter on management skills and best practices
- ◆ Assist in the development of the semesterly chapter goal setting retreat
- ◆ Ensure a successful transition

## Financial Advisor

### *Sample Roles*

- ◆ Assist the treasurer in developing the chapter budget and financial reports
- ◆ Meet with the financial committee on a monthly basis
- ◆ Work consistently with the treasurer to improve the chapter's culture of financial accountability
- ◆ Encourage the chapter to satisfy all requirements of the university, alumni, and International Fraternity financial assessments, reports, fees and deadlines
- ◆ Present to the chapter on financial best practices
- ◆ Identify a local accountant to assist in the annual audit and filing of taxes
- ◆ Assist with the establishment and maintenance of the chapter's endowment fund through the PIKE Foundation and participation in the *phi phi k a Club*
- ◆ Ensure a successful transition

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## Recruitment Advisor

### Sample Roles

- ◆ Assist the recruitment chairmen in developing the chapter's written recruitment program
- ◆ Help develop a philosophy and strategy for year-round recruitment
- ◆ Meet with the recruitment team on a monthly basis
- ◆ Assist in the development of the semesterly chapter recruitment retreat
- ◆ Provide comments and insights during the chapter recruitment retreat
- ◆ Provide alumni input and recruit alumni support for chapter recruitment activities
- ◆ Ensure a successful transition

## Educational Advisor

### Sample Roles

- ◆ Assist the membership development vice president in developing annual review of the TPE member development program
- ◆ Assist in the planning, preparing, and execution of the TPE member development program
- ◆ Aid in the development of the written 4-week new member education program, and written TPE educational curriculum for the various progression phases
- ◆ Communicate with the membership development VP and member development team bi-weekly
- ◆ Attend member development cabinet meetings and/or TPE education meetings-semesterly
- ◆ Aid in the development of the member development budget
- ◆ Assist the chapter events/speakers coordinator with guest speakers and organizing outside events
- ◆ Have a working knowledge of the *Ritual*; help facilitate *Ritual* execution and education
- ◆ Ensure a successful transition

## Health & Safety Advisor

### Sample Roles

- ◆ Help develop a crisis management plan, educate the membership on its implementation and update annually
- ◆ Assist in the presentation of the chapter's health & safety policies and procedures
- ◆ Assist the chapter in facilitating an understanding of and signing of the Fraternity's *Standards*
- ◆ Assist in resourcing speakers to present on health & safety issues
- ◆ Serve as a liaison to the house corporation
- ◆ Maintain a working relationship with police, fire inspectors, and health inspectors
- ◆ Ensure a successful transition

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## Time Commitment

The team advising concept was designed with a volunteer's time commitment in mind. The team advising concept was designed to give the most help to the chapter as possible, while not asking too much time from the advisory team. Below is a sample outline of the time commitment asked of a volunteer advisor. It is important to keep in mind that, one of the first steps after forming the advisory board, is to sit down with the board and executive council to decide the proper medium and amount of communication necessary.

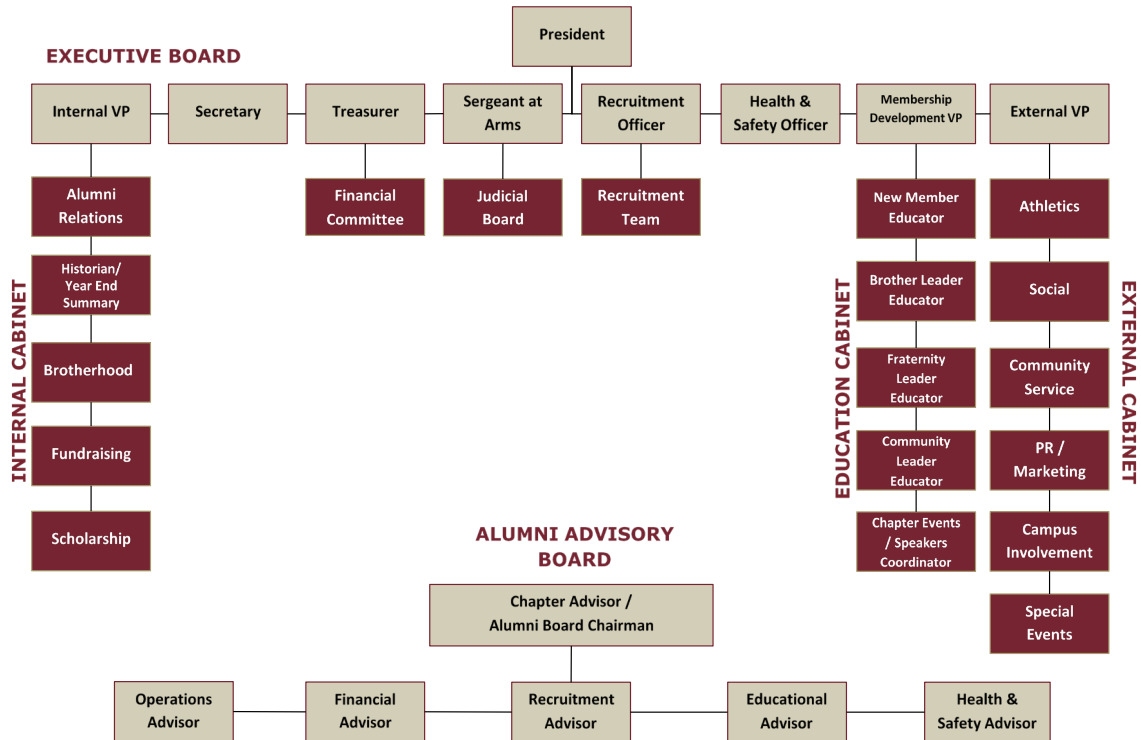
Alumni Advisor Board Position	Responsibilities	Skills	Time
<i>Chapter Advisor/ AAB Chairman</i>	-Serve as a resource to the chapter president and mentor to chapter members  -Serve as a liaison to the alumni advisory board, coordinating proper communication between the advisory board and chapter executives	-Leadership -Vision -Organization -Communication	-1-3 hours per week <i>(minimum)</i>  -Attend Chapter/Exec
<i>Operations Advisor</i>	-Assist the vice presidents with management and goal setting for their respective committees  -Make presentations to chapter on management skills and best practices	-Management -Organization -Trust	-1 weekend per semester (goal setting) -Bi-weekly communication
<i>Finance Advisor</i>	-Assist the treasurer with budgeting, creation of financial reports, and financial accountability -Auditing chapter yearly.	-Financial Management -Accounting -Organization	-1 weekend per semester (goal setting) -Bi-weekly communication
<i>Recruitment Advisor</i>	-Assist the recruitment chairmen in developing the chapter's recruitment strategy. Work with alumni to solicit recommendations for the chapter	-Sales -Motivation -Marketing -Advertising	-1 weekend per semester (goal setting) -Bi-weekly communication
<i>Education Advisor</i>	-Assist the VP of Membership Development in planning, preparing, and executing the TPE member development program	-Education -Public Speaking -Planning -Motivation	-1 weekend per semester (goal setting) -Bi-weekly communication
<i>Health &amp; Safety Advisor</i>	-Help to develop a crisis management, event management, and general health & safety plan -Help to coordinate speakers on a variety of health topics (cooking, mental health, bystander intervention, etc)	-Management -Awareness -Implementation -Operations	-1 weekend per semester (goal setting) -Bi-weekly communication

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## Advisor - Chapter Organizational Chart

### ORGANIZATIONAL FLOWCHART



## Getting Started as a Volunteer Advisor

As a chapter advisor or member of the advisory board, organizing the advising process can often be difficult. This may be your first experience with a PIKE chapter since you were an undergraduate! The following steps have been developed to help organize your volunteer board and get up to speed as quickly as possible

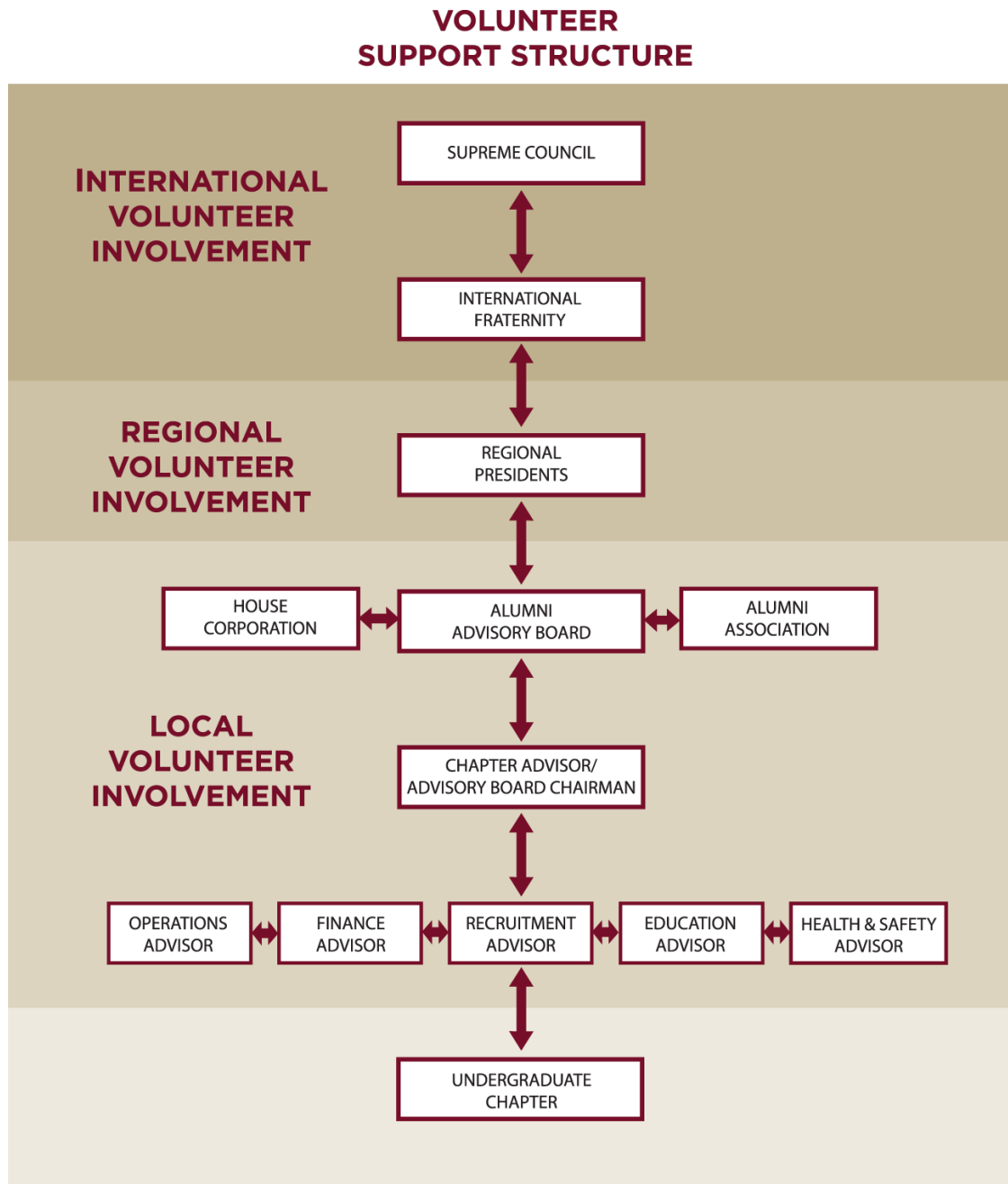
1. Review this reference with the regional president or chapter consultant and ask questions as necessary.
2. Establish a clear communication plan with the regional president and chapter consultant.
3. Contact the International Fraternity to update your contact information.
4. Meet with all advisory board team members to determine a meeting schedule and communication plan.
5. Meet with the chapter president to review the semester calendar, discuss chapter goals and establish a communication plan.
6. Become familiar with the resources available to advisory boards on [www.PIKES.org](http://www.PIKES.org) under *Alumni & Volunteers*. As you work to organize and integrate the advisory board, it is essential that you know what support and education is available.
7. Become familiar with how to find online resources available to chapter officers.
8. Make plans to attend your region's PIKE *University Leadership Summit*.

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# The Pi Kappa Alpha Volunteer Support System

## The Volunteer Support Structure

The following chart was developed to show the different layers that are available to you, as a volunteer, for support. Please do not hesitate to use all the resources in the chart and described below as you work with the local chapter.



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