

# **afa**

## **A “How To” Guide for Advisor Training**

**A Resource for the Members of:**

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*“The Association of Fraternity Advisors exists to support and stimulate persons who advise fraternities and sororities in higher education and to enhance the positive influence of the fraternity and sorority experience in student development by providing definition and recognition for the profession, encouraging research, establishing networks among related interests and creating forums for interaction and learning.” (AFA Bylaws)*

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# Index

Different campuses are at different implementation points for their chapter and faculty advisor training programs. Therefore we have gathered multiple resources for each stage of an accepted training model (ADDIE) to help with your own programs – regardless of whether you are just starting or have been meeting monthly for years. This index is organized by the ADDIE Model.



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## Why is AFA providing this resource?

This manual is being offered by the Association to provide a mission-based service to our members. AFA is supporting its members by providing a booklet of ideas and resources related to chapter and faculty advisor education. Our partners within the inter/national fraternities and sororities already provide chapter advisors with educational program tracks at conventions and leadership schools, manuals, CDs, regional workshops, and special services offered through their websites.

This resource is not meant to replace or repeat services already provided by the inter/national organizations. Resourceful alumni have their own manuals or can easily obtain them from their own organization. This manual is offered to help busy campus fraternity and sorority professionals provide supplementary programs to chapter advisors by integrating the context of each campus's unique cultural characteristics and the campus's chapter advisor needs.

If you were to read through the advisor manual of every chapter on your campus, you would find common themes and topics:

- The role of the chapter advisor
- Job descriptions of the chapter advisor
- Organizational policies and procedures
- Risk management policies: alcohol, hazing, housing, firearms, etc.
- Crisis management policies and procedures
- Etc.

What this manual will provide is a “how-to” for setting up campus-specific workshops, retreats, and other educational/training opportunities. As one AFA leader describes it – this manual is “plug and play” ready – for you to use and tweak to make it very campus-specific, addressing the needs of the chapter advisors who support your chapters on a regular basis.

Veteran fraternity and sorority advisors, inter/national staff members, and volunteers have seen a consistent pattern over the years. They know that excellent chapters have excellent chapter advisors supporting them. Some chapters may have a whole team of alumni/ae, other chapters may have one or two very strong, consistent, and respected chapter advisors. For these reasons, this how-to guide is offered to AFA members.

# A Mission-based Resource

AFA promotes six core competencies for campus fraternity/sorority advisors:

***Mission, Vision, and Shared Values***  
***Partnerships and Coalitions***  
***Learning Opportunities***  
***Ethical Standards***  
***Communication***  
***Technology***

(See AFA Core Competencies for Excellence in the Profession in Supplementary Materials, page 30)

## **Partnerships and Coalitions**

One of the critical competencies involves intentionally collaborating with chapter advisors and our other campus partners. Collaboration is a basic expectation of a campus advisor.

A successful fraternity/sorority advisor:

- Establishes and maintains trusting relationships with all constituents who include: members, prospective members, parents, alumni, volunteers, fraternity and sorority headquarters staffs, chapter house directors, university faculty, staff and administrators, local and campus community, and vendors
- Brings together the various undergraduate segments of the fraternity and sorority community on a frequent basis to build a shared understanding
- Serves as a liaison to colleagues and upper level administration to develop an understanding of fraternity and sorority community needs for organizational development
- Seeks opportunities to build and strengthen partnerships across the campus, the community, and the profession

To this end, campus advisors are encouraged to provide specific training and networking opportunities for chapter and faculty advisors. Successful initiatives implemented by AFA members include:

- Monthly fraternity/sorority community updates sent to all constituents
- Annual reports/state of the system summary to all constituents
- Monthly chapter advisor meetings/roundtables
- One day conferences and retreats for chapter advisors
- Ropes/Teams course activities for advisors
- Simulations of events modeling the correct way to implement the campus/organizational risk management policy
- A series of workshops specifically for advisors
- Exhibit of suppliers (housing needs, t-shirt vendors, etc.)
- Meetings with upper-level administrators



The campus advisor exists to serve others. There are many constituents who would benefit from your expertise and knowledge. AFA is fully aware that fraternity/sorority advisors have a lot of responsibilities and dedicate many long hours. You might even be thinking, “I don’t have TIME to do more right now.” But, providing training and collaborating experiences for advisors could be a great way to work smarter, not necessarily harder.

AFA also wants to provide a gentle reminder – “You do not have to present a workshop on every topic in this manual.” What AFA does want is for you to facilitate the implementation of training. And, if you want to share your public speaking talent you can always choose to do so.

This manual provides several components to help you implement some of these chapter advisor services. While this is not an exhaustive list, it will hopefully spark your own good thinking about resources and services for your own campus community.

## Chapter Advisor Training Essentials: The ADDIE Model of Instructional Design

To help you implement a solid training program, we offer the ADDIE Model to use as a step-by-step process. The ADDIE Model of Instructional Design is a widely-used model of developing educational programs. “It began in the early 1960’s providing a template for the developing of instruction by the U.S. military. It is still used by government agencies to develop courses. It is used by utilities, process plants, and human health systems. It outlines five primary phases for instructional design.”

**Analyze:** Discovering where performance gaps are uncovered and desired outcomes are defined.

**Design:** Creating a plan to achieve the desired outcomes.

**Develop:** Detailing a plan of action that lists step-by-step procedures for implementing the design.

**Implement:** Putting the plan into action.

**Evaluate:** Measuring the success of the instruction/program.

(Verbatim, The ASTD Handbook of Training Design and Delivery. George M. Piskurich, Peter Beckschi, Brandon Hall, editors. Page 30). ]

# Using the Concepts/Awareness/Skills Model

Concepts/Awareness/Skills is a widely held model in student affairs for determining areas of emphasis for education and training. The three elements make up numerous leadership and student development models.

Think through all of the issues and topics that would benefit chapter advisors.

## Ask yourself:

- Who is the primary audience for this particular program offering? Who is the secondary audience?
- What are the specific educational needs of the chapter advisors for this campus?
- What are the goals and objectives of the presentation(s)?
- What am I trying to emphasize with students? How does this complement their advisors' education?
- How did the last session on this topic go? (if done before)
- How do I know if I met their needs?

## CONCEPTS

Know the topics, tools, and resources to support chapter advisors

**For example:** risk management issues for chapter advisors, dealing with crises, working with the media, recruitment tools, values education and moral development of students, judicial processes, academic achievement, wellness issues

## AWARENESS

Be open to different perspectives and value those perspectives

**For example:** inter/national fraternity and sorority trends, student perspectives, issues in higher education, self-governance, campus policies and procedures, student development professionals, headquarters partners, etc.

## SKILLS

Develop skills specifically related to chapter advisement

**For example:** creating change, helping members build morale, building coalitions, advising effectively, utilizing campus and national resources, managing conflict

## Advisor Needs: Ways to Gather Relevant Information

To provide the best programming possible for the advisors, it is essential to ask them what they need. A needs analysis identifies the gap between their current knowledge and desired/required knowledge. With a needs analysis, your educational programming will be more purposeful, practical, and appreciated by advisors.

**Observation** – can be done by watching and listening to advisors.

**Questionnaires** – can be given at educational programs, meetings, on-line, newsletters, etc.

**Focus Groups** – can be done by you, students, or involved alumni. It's a good way to meet face to face and gather qualitative (anecdotal information, thoughts, and opinions) as well as quantitative data (measurable data such as number of workshops they attended and will attend, how much time they have for training, how far they live from campus or the training site, etc.).

**Interviews** – can be done in person or on the phone. This helps advisors know their opinions matter enough that they would be called.

**Historical Documentation** – can be gathered by analyzing past attendance records, popular topics, etc.

Source: The Systematic Design of Instruction (3rd ed.). New York: HarperCollins. W. Dick & L. Carey. (1990) and Rapid Instructional Design. San Francisco: Jossey-Bass/Pfeiffer. G.M. Piskurich. (2000).

## Needs Assessment: Sample Questions

What is the age-range of the advisors?

What should you as an advisor be doing that you are not doing?

What skills do you want to develop or strengthen?

What campus issues do you want to discuss?

What national trends do you want to know about?

What topics would help you be a better advisor?

**Sample questions are provided to help you think through the educational programs you and/or your staff should offer. These questions could be used in questionnaires, focus groups, and/or interviews. Pick and choose the questions relevant to your assessment needs.**

What tools do you believe you need in order to be more effective?

How do you want to communicate with other advisors (newsletters, on-line, face-to-face)?

What are chapter members doing now that they should not be doing?

How do you believe the chapter will be improved as a result of your training?

What chapter performance standards must be considered for programming?

What issues most affect you as an advisor?

What has been done in the past with great success? With tepid results?  
With poor results?

What topics have been offered in the past that are still relevant?

What educational program formats do you prefer (1-2 hour seminars, on-line programs, “boot camp” for specific levels of knowledge, half-day training, weekend retreat, orientation, etc.)?

What stellar facilitators/presenters do you know?

## A Sample Needs Assessment

Ask chapter advisors to read through the following national “hot topics” listing collected by campus fraternity and sorority advisors as well as several chapter advisors. Ask them to put a check mark next to topics in which they are interested. Then ask them to circle their top three educational needs in each category: Concepts, Awareness, Skills.

### CONCEPTS

*Topics, tools, and resources to support chapter advisors*

- The differences between the role of the campus and chapter advisor
- Managing personal risk
- Educating students about risk management issues
- Campus policies – alcohol, drugs, hazing, etc.
- Understanding campus procedures and dealing with crises
- Working with the media
- Recruitment tools
- Providing values education and moral development to students
- Campus judicial processes
- Resources for chapter and individual academic achievement
- Wellness issues
- Social event planning
- Non-alcoholic event planning
- Involvement and membership in AFA
- Eating disorders
- Problem drinking, alcohol addiction, referring students to counseling
- Setting appropriate boundaries with students
- Campus-based chapter assessment programs
- Campus-based awards and/or standards
- Campus resources (career services, counseling, volunteer, public relations, alumni services, etc.)

## **AWARENESS**

*Be open to different perspectives and value those perspectives*

- \_\_\_\_\_ National fraternity and sorority trends
- \_\_\_\_\_ Today's student issues, generational differences
- \_\_\_\_\_ Issues in higher education
- \_\_\_\_\_ Self-governance
- \_\_\_\_\_ Campus policies and procedures
- \_\_\_\_\_ Understanding the services and resources of student development professionals
- \_\_\_\_\_ Emerging hazing issues
- \_\_\_\_\_ National alcohol consumption trends
- \_\_\_\_\_ Teambuilding with other chapter advisors
- \_\_\_\_\_ Student stress points and emotional development (midterms, high stress times, returning home for the holidays, etc.)
- \_\_\_\_\_ Housing safety
- \_\_\_\_\_ The Big Picture: NIC, NPC, NPHC, NALFO
- \_\_\_\_\_ The direction and mission of the student affairs division
- \_\_\_\_\_ Trends in new and continuing member education
- \_\_\_\_\_ Interfraternal relationships

## **SKILLS**

*Practice skills specifically related to chapter advisement*

- \_\_\_\_\_ Creating change
- \_\_\_\_\_ Helping members build morale
- \_\_\_\_\_ Building coalitions
- \_\_\_\_\_ Advising effectively
- \_\_\_\_\_ Utilizing campus and national resources
- \_\_\_\_\_ Managing conflict
- \_\_\_\_\_ Confronting students, personal accountability
- \_\_\_\_\_ Chapter financial planning
- \_\_\_\_\_ Leading team builders and other sisterhood/brotherhood activities
- \_\_\_\_\_ Long-range planning
- \_\_\_\_\_ Goal setting
- \_\_\_\_\_ Replacing myself as a volunteer
- \_\_\_\_\_ Recruiting more chapter advisors
- \_\_\_\_\_ Maximizing the involvement of a faculty advisor
- \_\_\_\_\_ Breaking from harmful traditions
- \_\_\_\_\_ Managing an advisory board
- \_\_\_\_\_ Assisting students with officer training and transition

# Basic Adult Learning Principles

Now that you know the needs of the chapter advisors, it's time to think about the ways adults take in information. Chapter advisors are adult learners and take in information very differently from students.

One way to prepare yourself and/or guest speakers is to make sure they know and understand basic adult learning principles. While some speakers are topic experts, they may not take into account the learning needs of participants.

In Jane Vella's book, *Learning to Listen, Learning to Teach*, she outlines several principles to nurture and facilitate dialogue in adult learning. Keep these key principles in mind when preparing speakers and choosing the learning environment:

## **Adults want:**

Safety in the environment and the process

A sound relationship between teacher and learner for learning and development

Action with reflection or learning by doing

Respect for learners as subjects of their own learning

Teamwork: using small groups

Engagement of the learners in what they are learning

(Verbatim, Jane Vella, (1994). *Learning to Listen, Learning to Teach*. San Francisco: Jossey-Bass Publishers, pages 3-4)

## **Using the above list, topic experts and guest speakers should be provided with the following information:**

- Demographics of advisors (ages, length of service to chapter, past experience with the topic, etc.)
- How well the advisors know each other
- How familiar advisors are with the topic
- Time for the speaker to establish credibility and familiarity with the advisors
- Opportunities for advisors to learn by "doing"
- Time to make sense of the topic within the context of chapter advisement (What does that mean for me as an advisor? How will this impact individuals? How will it impact the chapter? How do I communicate what I learned to the chapter? How do I apply this to my role as an advisor?)
- Time for sharing and interaction among the advisors
- Opportunity to ask questions of the "expert"

## Speaker Preparation: The Must Haves



Designing your training program involves a detailed plan of action. The following list provides you with specific information that will benefit the workshop presenter. It will help him/her with basic information about your audience and how they can maximize their learning.

- Date and time of program
- Participant demographics (# of men, women, any relevant demographics pertinent to the topic)
- Location of program, map
- Budget for the program, speaker honorarium
- Student affairs division mission statement
- Fraternity/Sorority affairs office mission statement
- Fraternity/Sorority community purpose or mission statement/constitution
- Chapter/faculty advisor expectations sheet
- Names of all chapters (distinguish between male and female groups)
- Fraternity/sorority promotional materials and website address
- Learning objectives determined by campus advisor (gleaned from needs assessment)
- Expectations for handouts/learning aids
- AV request
- Handout due date for duplication and distribution at session
- Other:

# Create a Plan to Achieve Your Desired Outcomes

## 1

### Lesson Planning

Program design is concerned with subject matter analysis, lesson planning, and media selection. Now that you have a list of potential topics based on the chapter advisors' needs, you can begin planning.

Select topics and then think about your prioritized content. At the end of the session, what do you want advisors to know? What do you want them to do?

Ask yourself:

What information do I want to convey?

What skills will be enhanced by this topic/speaker?

What follow-up do you expect after the program?

What tools for teaching will be used (handouts/worksheets, manuals, videos, overhead transparencies, PowerPoint, on-line programming, interactive activities, assessments, etc.)?

## 2

### Action Planning

Now detail a plan of action listing step-by-step procedures for implementing the design.

Ask yourself:

Have the learning needs of the advisors been accurately analyzed?

Do the learning outcomes match the needs of the advisors?

How effective are the teaching tools for the program? How appropriate are they for adult learners?

Based on the number of topics selected, what is the best format for providing this information (monthly meetings, handouts/mailings, half-day conference, one day conference, weekend workshop, etc.)?

# Three Sample Structures for Training Programs

The examples provided are from *AFA's Ideas for Practice* resource.

## 1. Series

An annual series of topics presented at round tables, regular meetings, and/or newsletters with pertinent advisement topics, etc.

Idea for Practice:

Alumni Advisor Education Series (AAES) – University of California, Los Angeles. See pages 34-37 for the full description.

## 2. Conference

A half- or one-day conference provides several topics in one day. This can be done in 3-4 hours or, if an appropriate budget and support can be provided, a 6-8 hour conference. Opportunities to talk with other like-advisors can be provided (i.e. faculty advisors, housing corporation board volunteers, general chapter advisement, recruitment, etc.). Meals with networking time could be provided. Opportunities to meet with campus student development professionals can also be arranged.

Idea for Practice:

Chapter Advisors' Conference – Rutgers University. See pages 32-33 for the full description.

## 3. Membership Association

An alumni advisor association can be a great way to support life-long fraternity/sorority involvement and campus contributions. This is an individual membership association in which the organization acts as a source of support for advisors. Regular monthly meetings can be held in addition to special events such as conferences, special speakers, and networking/social events.

Depending on the purpose of the association, volunteers can partner with campus advisors by providing training/education to chapters, helping the campus advisor with special projects, fundraising for specific campus needs, and serving as alumni ambassadors for the college/university.

Ideas for Practice:

Alumni Advisor Association – Purdue University. See pages 40-41 for the full description.

Alumni Advisory Team – University of Louisiana, Lafayette. See pages 38-39 for the full description.

## Sample Series Calendar (based on a semester calendar)

### August: “Tensions with Transitions”

Possible speaker(s):

counseling center staff, new student orientation staff, residence life staff

Sample Description:

Understand the emotional rollercoaster of your members during this transitional period. New students are adapting to a new environment, teacher expectations, and homesickness. Other members are struggling with roommate issues. Officers are getting back into the groove of managing a group of peers. Seniors are beginning to look forward thinking about their professions.

### September: “Safely and Effectively Managing Risk”

Possible speaker(s):

alumni guest, lawyer, campus judicial officer, undergraduate governing council risk management chair, alcohol educator

Sample Description:

The beginning of the school year marks a time of reconnection and ... parties. This session will help you understand your own organization’s risk management policies and campus policies/procedures related to safe party planning and implementation. Understand your own risk as well as the chapter’s for a safe beginning to the school year.

### October: “Managing Expectations: Advisor/Student Expectations”

Possible speaker(s):

campus fraternity/sorority advisor, experienced chapter advisors, alumni volunteers, headquarters staff

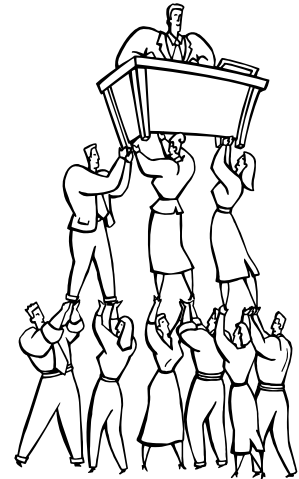
Sample Description:

What exactly is the role of the advisor - is it to be a change agent? Work out personal conflict in the organization? Take care of the organization in times of crisis? If you ask your colleagues and then ask the students you may get very different answers. This session will explore the role of the advisor, help you establish a statement of understanding with the students, and provide helpful hints from experienced advisors. (See sample Workshop Outline on pages 42-43.)

## **November: “Your Campus Resources”**

Possible speaker(s):  
any staff in student affairs

Sample Description: Meet the various student affairs staff members providing services and resources to our students. This is an informal time to meet with other advisors as well as key student affairs administrators who care about our students.



## **December: (no meeting)**

Instead of a face-to-face meeting, provide a newsletter of things to do to take care of the chapter facility over the winter break.

Possible resource(s):  
experienced house corporation volunteers, housing manuals from inter/national headquarters, campus public safety staff, local fire and police departments

Sample Description:  
Provide helpful facility management topics and reminders through a newsletter mailed to all house corporation volunteers and chapter advisors. Remind them about freezing pipes, facility security, fire safety, snow/ice removal (if applicable), etc. Provide January move-in dates for the campus. Remind them about having the chapter officers update their officer rosters and provide any additional information about Spring recruitment.

## **January: “Today’s Students”**

Possible speaker(s):  
campus admissions staff, enrollment management staff, alumni volunteers, higher education educators, student affairs staff

Sample Description:  
The perspectives of alumni and today’s students can be wildly different. Participants will gain a profile of today’s entering freshmen for our campus. Generational differences will be examined and discussed so advisors can understand how their view of issues has been shaped over the years. Trends in higher education, the fraternity community, volunteerism, and society will be emphasized as well.

## February: “Crisis Management”

Possible speaker(s):

counseling center staff, health and safety officers, alcohol and other drug educators, campus crisis team members, health center staff, hospital staff, judicial officer, campus communications staff

Sample Description:

While many students plan for the “play hard” time of spring break, now is the time for advisors to proactively plan for managing crises. Learn about the campus procedures in the event of an emergency. Develop a plan for your own chapter to implement and use during officer training and transition. Learn how to work with and manage the media in the event of a crisis.

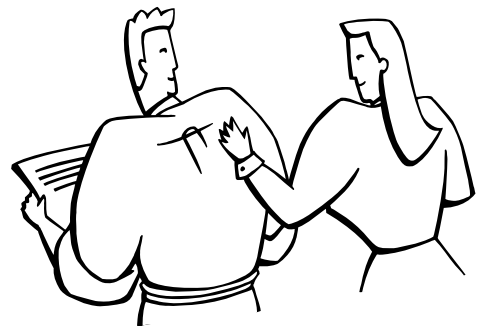
## March: “An Intro to Student Development Theory or – Why do students do the things they do?”

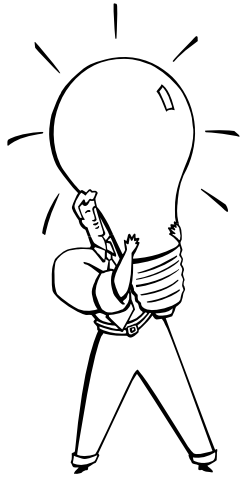
Possible speaker(s):

student development professor, counseling center staff, student affairs staff, program board advisors, academic advising center staff

Sample Description:

Understanding how students develop during the course of their undergraduate experience is critical for today’s advisor. While you may get frustrated with some behaviors and attitudes in the organization, it will be comforting to know that students are going through a natural progression of personal challenges. An overview of several student development theories will be covered during this session.





### **April: “Study Skills Resources”**

#### Possible speaker(s):

tutoring and academic advisors, reading and computer lab assistants, counseling center staff, National Collegiate Athletics Association (NCAA) Life Skills advisors in the athletics department, library staff

#### Sample Description:

As the end of the term winds down, be sure you know your campus resources to point students in the right direction. While most of them have used the library, they may not know all of the other resources at their fingertips that will help them succeed academically. This session will provide you with an overview of all the resources our campus has to offer.

### **May: “Appreciation Dinner”**

#### Possible speaker(s):

campus fraternity/sorority advisor, student affairs administrators, select student leaders, alumni affairs staff, University president, vice president for student affairs

#### Sample Description:

Let us show our appreciation for your commitment to your chapter! Come to our Appreciation Dinner at 6:00 p.m. on Thursday evening in the Alumni Center. You will hear an update on the “State of the Fraternity/Sorority Community” from our upper level administrators. This is our time to thank you for all you have given the students and your alma mater and/or your chapter.

# Sample Conference Agenda

<b>9:00-9:30 a.m.</b>	<b>Brunch &amp; Conference Welcome</b> Welcome by campus advisor and planning team Informal discussion time Introductions and networking activities for advisors Review conference schedule
<b>9:30-10:30</b>	<b>General Session: “Today’s Students”</b>
<b>10:45-11:00 a.m.</b>	<b>Break</b>
<b>11:00 a.m.- 12 noon</b>	<b>Break Out Session Options</b> “Advising Basics for New Advisors” “Academic Resources” “Student Stresses” “Rules, Rules, Rules: Campus Policies, Procedures, and Resources” “Senior Involvement – A Re-commitment to Life Membership” “Officer Training and Transition Resources”
<b>12:00-1:15 p.m.</b>	<b>Informal Box Lunch</b>
<b>1:15-2:15 p.m.</b>	<b>Constituency Group Meetings</b> Meet with like-advisors during this time: Corporation board volunteers Risk management advisors Recruitment advisors Faculty advisors Chapter advisors
<b>2:15-2:30 p.m.</b>	<b>Break</b>
<b>2:30-3:45 p.m.</b>	<b>Break Out Session Options</b> “Your Liability as an Advisor” “Trends in Campus Safety” “Alcohol Use & Abuse” “Sexual Assault” “Crisis Management” “Promoting Values Education”
<b>3:45-4:00 p.m.</b>	<b>Break</b>
<b>4:00-5:00 p.m.</b>	<b>Wrap-Up</b> Provide closure to the conference and thank appropriate people Provide a list of chapter advisor meetings for the year

## Developing Your Own Sessions

As the campus fraternity/sorority advisor you might be tempted to present all the chapter advisor training sessions yourself. Sure, you have the resources to develop a high-quality series of sessions, but should presenting all the content be your role? Chapter advisors benefit from hearing different perspectives and opinions and the chapters benefit from them knowing different campus professionals and the services and resources.

There are topics that campus fraternity/sorority advisors are uniquely equipped to present. Think about the topics which are your personal favorites. Balance your favorites with topics which might not be your favorites but would be best addressed by you as the fraternity/sorority professional.

One workshop outline and complementary worksheets/handouts are provided for your convenience.

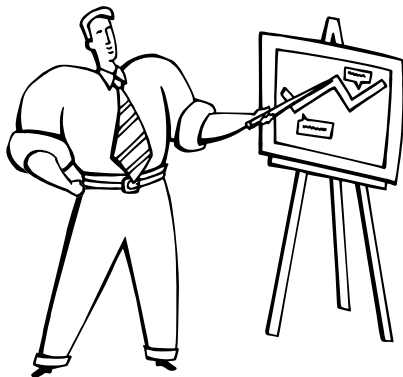
The workshop outline provided uses a format of activity time/running time.

For example:

**10/25          Small Group Work**

This means 10 minutes are allocated for small group work (activity time) and you should be 25 minutes into the entire workshop (running time).

Use the outline provided on pages 42-43 in the Supplementary Materials section in the back of this resource. Feel free to add your own activities, discussion questions, worksheets, and processing points based on your experience.



## Putting the Plan into Action: Finding Great Resources

Now that you've analyzed the needs of the chapter advisors, determined the format of the training session(s), and developed a detailed plan of action, it's time to implement your plan.

***Remember AFA's word of caution – you do not have to do this all yourself.***

Identify individuals who could help you implement the plan. Choose campus resources, guest speakers, and alumni volunteers to help get the word out and encourage others to attend.

### Great Resources on Campus

Determine when to use topic experts for the training programs. There are some topics that are best addressed by other campus and community professionals. Based on feedback from AFA members, the following helpful campus and community resources have been recommended for your alumni and faculty advisor training:

**Alumni Affairs Office** – recruiting and retaining alumni volunteers, special event coordination, reunion assistance, Founders Day assistance, Homecoming event assistance

**Alumni Advisors** – can be topic experts (real estate, housing safety, eating disorders, etc.)

**Academic Support Services** – study skills workshops, managing stress, test taking skills workshops, academic resources

**Admissions Office** – new student demographics, staying in tune with new student issues and needs, the number of potential members or “likely joiners”

**Area campus fraternity and sorority advisors and AFA Area Coordinators** – trade/barter workshops with other area campus advisors to discuss national and regional fraternity/sorority issues

**Campus Ministries** – spiritual, healing, loss, or grievance counseling

**Career Services** – resume writing, working through senior transition issues, alumni databases, job and internship contacts

**Counseling Center/Health Center** – crisis intervention, adjustment issues of college students, sexual assault, eating disorders, healthy living, addiction issues, peer education, sexually transmitted diseases, HIV-AIDS, men’s health issues, women’s health issues, mental health

**Diversity/Multicultural Support Center** – multicultural awareness, power and race, international student issues

**Education Faculty** – learning styles, faculty relations, learning profiles/ disabilities, membership education issues

**Financial Aid** – student budgeting, scholarships available, work study programs

**Fire Department** – using and updating fire extinguishers, list of to-dos for holiday breaks

**Gay/Lesbian/Bisexual/Transgendered/Questioning Resource Center** – issues related to sexual orientation/identity issues

**Inter/National Headquarters Staff** – many of these individuals have ready-to-present workshops and can be terrific educational partners if given advance notice before their campus visit

**Judicial Affairs** – standards, self-governance, accountability issues

**Public Relations/Marketing Office** – dealing with the media, crisis and communication management, special event/anniversary promotion, alumni publications

**Public Safety** – security, safety, housing safety, sexual assault, fire safety

**Recreation/Fitness** – exercise, nutrition, team development, intramurals, sports clubs, individual fitness classes, continuing education

**Residence Life** – comparing and contrasting the prices of services provided to residence hall dwellers and fraternity/sorority house dwellers, peer education programs, wellness

**Victim Services** – sexual assault, crime

**Women’s Resource Center** – women’s leadership issues, self-esteem, eating disorders, sexual harassment

# Training Reminders from AFA Colleagues

## 1. **Develop relationships**

Get to know each advisor with an initial face-to-face meeting. This effort will help establish clear expectations and good relationships; this can go a long way during challenging times. If they know you, they are more likely to attend your training meetings.

## 2. **Communication**

Communications must be clear, open, honest, timely, and consistent.

## 3. **Regular meetings**

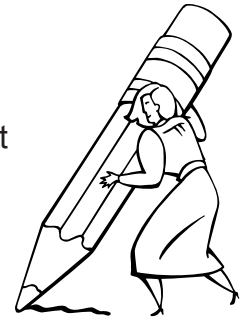
Hold regular meetings and try to provide food. Many volunteers have families and can only meet in the early evening...provide dinner for them and be flexible if they need to bring their children. Ask a student leader to watch them while you have the meeting or they can sit in the back and play games.

## 4. **Basic information**

Provide them with contact information for your office and other pertinent emergency/campus contacts.

## 5. **Ongoing communications**

Copy advisors on all correspondence sent to the president/officers of the chapter, the good and bad.



Send advisors copies of current events, news, and trends in fraternity/sorority life. Copy and send pertinent articles from *AFA Perspectives*. They can only help with the change if they are aware of what is going on around the country.

## 6. **Set clear expectations**

Discuss mutual expectations with both faculty and alumni advisors. What can you expect from each other?

## 7. **Inter/national organization involvement**

Before issues become problems, talk with alumni advisors before talking with representatives from the inter/national headquarters. All three constituency groups should be informed. Advisors should know about any policy or judicial issues directly from you as the campus representative.

## 8. **Say thank you**

Recognize advisors and appreciate their contributions. Remember they are volunteers. Show your appreciation through cards and thank you notes. Chapter advisors can be your strongest and best allies.

# Existing AFA Resources for Your Training

## Ideas for Practice

This is designed to be a dynamic resource for fraternity and sorority advisors. Created so that colleagues can share their best ideas for practice with one another, this resource grows and changes over time. AFA suggests that advisors insert their compilation into a binder and liberally borrow from it. Use it in your own campus context for a customized “fit.” The AFA leaders also look to members to submit their own contributions for future editions so be sure to give your own great ideas.

Topics include:

- All Fraternity/Sorority Events
- Campus Outreach
- Community Outreach
- Housing
- Recruitment
- Scholarship
- Alumni/ae and Advisors
- Communications/Public Relations
- Diversity
- Leadership Development
- Risk Management
- Standards and Recognition Programs

Examples from this Manual

(These highlighted programs can also be found in the *AFA Ideas for Practice* under the Alumni/ae and Advisors section)

- UCLA Alumni Advisor Education series (AAES) UCLA (see pages 32-33)
- Chapter Advisors’ Conference – Rutgers (see pages 34-37)
- Alumni Advisory Team (see Supplementary Materials pages 38-39)
- Campus Alumni/Alumnae Advisor Association – Purdue University (see pages 40-41)

## Advising Fraternities and Sororities Manual

Each of the chapters can be printed, copied and distributed to chapter and faculty advisors. This is a great tool for handouts during sessions or for reading between meetings. Available at <http://www.fraternityadvisors.org/resources/index.htm>.

## Associate Members

Associate Members are individuals and companies providing services and goods to campus advisors. Some associate members are skilled topic experts who can help you to provide advisor/volunteer training. A complete listing is available on the AFA website at [www.fraternityadvisors.org](http://www.fraternityadvisors.org).

# Measuring the Success of the Instruction/Program: Overview

Students often get caught up in the excitement and planning of their own programs. Once the program or event is over, they tend to quickly move on to the next “big thing.” Campus advisors can also fall into that trap.

Evaluations are a critical part of the educational process. Take time to explore the following questions before you develop an evaluation instrument.

Ask yourself:

Do you have a standard program evaluation? Does it measure the important elements (i.e. addressing learning outcomes, instructor effectiveness, etc.)?

How are advisor needs met?

What are the gaps in programming/training?

How can this program be improved?

Which speakers should be retained?

Two sample evaluations are provided on pages 49-50 for your convenience. Evaluations provide a good way to document the success of each program as well as the number of people served, the effectiveness of the instructor, the timing of the program, and the advance communication about the program. They also provide critical feedback for improvement and can help you strengthen your advisor education initiatives.



## AFA Core Competencies for Excellence in the Profession

Competencies are characteristics of a professional such as knowledge, skills, attitudes, and motivations that are expressed through behavior and contribute to superior job performance. Core competencies are competencies that generally apply to most positions at each level. They lay the foundation for developing a highly qualified and effective person and are used to develop an Association wide training program, assist individuals in career development, build programs for leadership development and succession planning, develop criteria for hiring, and manage performance.

### **Mission, Vision, and Shared Values**

- Facilitates the development of a clear and concise mission statement for the fraternity and sorority community, consistent with the institution's mission, that incorporates the values of the fraternity and sorority community collaboratively with all constituents
- Develops a clear set of expectations for and services provided to chapters and proactively communicates to all constituents
- Assists community leaders in facilitating the long standing shared values of fraternities and sororities in an increasingly pluralistic society

### **Partnerships and Coalitions**

- Establishes and maintains trusting relationships with all constituents who include: members, prospective members, parents, alumni, volunteers, fraternity and sorority headquarters staffs, chapter house directors, university faculty, staff and administrators, local and campus community, and vendors
- Brings together the various undergraduate segments of the fraternity and sorority community on a frequent basis to build a shared understanding
- Serves as a liaison to colleagues and upper level administration to develop an understanding of fraternity and sorority community needs for organizational development
- Seeks opportunities to build and strengthen partnerships across the campus, the community, and the profession

## **Learning Opportunities**

- Supports/provides a regular assessment of and public recognition process for the fraternity and sorority community to gauge how effectively chapters are adhering to their founding principles and university expectations
- Utilizes knowledge of student development theory and higher education issues when working with students
- Serves as a resource for organization leaders to understand the diversification of campus communities and society and the impact of this on fraternities and sororities
- Understands organizational behaviors and trends among college students and applies theoretical concepts in developing the fraternity and sorority community
- Strategically plans and implements efforts
- Manages and effectively resolves crisis situations resulting in more informed and educated students
- Understands current issues and trends facing fraternities and sororities
- Develops programs that enhance scholarship within the community

## **Ethical Standards**

- Respects the boundaries between professional and students and assists those they supervise in that understanding
- Exhibits leadership skills including critical thinking, risk taking, and creativity while intentionally making values based decisions
- Provides honest and accurate information when debating issues of fraternity and sorority life

## **Communication**

- Understands alumni structures of both the institution and fraternal organization and the different national structures of advisors and headquarters (NALFO, NIC, NPC, NPHC, and others) and how this determines information dissemination
- Engages in consistent and proactive communication with constituents about the accomplishments and challenges of the fraternity and sorority community
- Provides all constituents with accurate statistics, current institutional status, membership expectations, and disciplinary actions of fraternities and sororities through regular communication
- Provides information and statistics of specific programs and services that chapters are providing to campus and local community

## **Technology** (based on resources available at institution)

- Promotes the practical application and effective use of technology
- Provides on-line information and maintains current websites

# Association of Fraternity Advisors Code of Ethics

This Code of Ethics for members of the Association of Fraternity Advisors serves to promote and maintain the highest standards of advising and personal conduct among its members. Adherence to these principles by members of the Association is encouraged, and such performance serves to assure public confidence in the integrity and service of advisors to men's and women's fraternities.

As a member of the Association of Fraternity Advisors, I personally commit myself to these provisions and will be ever mindful of the importance of acting on these ethical principles during my daily practice as a student affairs professional. I promise to:

1. Maintain the highest standard of personal conduct.
2. Actively promote and encourage the highest level of ethics within the profession and my institution or organization.
3. Maintain loyalty to the institution that employs me and pursue its objectives in ways that are consistent with the public interest.
4. Recognize and discharge my responsibility and that of my institution or organization to uphold all laws and regulations relating to my institution's or organization's policies and activities.
5. Strive for excellence in all aspects of management and leadership of my institution or organization.
6. Use only legal and ethical means in all of my institution or organization's activities.
7. Serve all members of my institution impartially.
8. Maintain the confidentiality of privileged information entrusted or known to me by virtue of my position.
9. Refuse to engage in, or countenance, discrimination on the basis of race, sex, age, religion, national origin, sexual orientation, or disability.
10. Always communicate the institution's internal and external statements in a truthful and accurate manner by assuring that there is integrity in the data and information used by my institution or organization.
11. Cooperate in every reasonable and proper way with other fraternity advisors, and work with them in the advancement of the profession of fraternity advising.
12. Use every opportunity to improve public understanding of the role of fraternity advising.

# Chapter Advisors' Conference

## Rutgers University

### **Abstract**

We designed a conference to meet the needs to the Chapter Advisors in the state of New Jersey. Each campus-based professional sent a letter, including registration materials, to their chapter advisors. One institution donated folders and pens for each participant, which were distributed at registration. Each fraternity/sorority advisor brought extra copies of handouts from programs presented on their campus during the year creating a mini developmental resource area.

### **Context**

The fraternity/sorority advisors in the state of New Jersey decided to create and facilitate a chapter advisors' conference due to the following two points: realizing that chapter advisors play a crucial role in the growth and development of undergraduate chapters and that an advisor's frequent contact and interaction with a chapter provides students with direction, guidance and support. The conference was held in the spring and included four educational session blocks and lunch.

### **Desired Outcomes**

We designed a conference and selected speakers to help us meet the following two outcomes:

- To encourage advisors to use the organization's founding principles to provide guidance.
- To gain new insights from the educational sessions and other conference participants.

### **Target Audience**

Chapter advisors in the state of New Jersey

### **Cost Effectiveness**

The program, although large in scale, was not very expensive. Participants were charged a small registration fee (\$10) to cover the cost of their meal.

### **Replicability**

The key to being able to replicate this program is the commitment of the campus professionals and the proximity of the campuses involved. Although not every campus in New Jersey participated, those that did (seven total) were committed to seeing the program succeed and made a great effort to promote the conference to their own advisors. Programming like this is not typically offered to chapter advisors so the turn out (37) was very good.

## Evidence of Success

51% of the participants returned the conference evaluation with the following feedback:

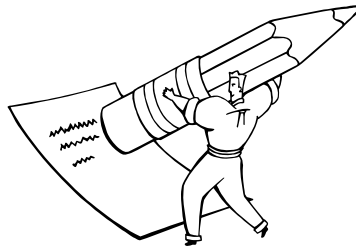
- What did you like best about the conference?
- Opportunity to share information and ideas with other advisors and handouts for future use.
- Meeting other advisors and finding out we all have the same problems.
- Presentations were very relevant and informative.
- Roundtable discussions were very open and helpful.

What did you like least about the conference?

- An opening speech would have been nice to set the tone for the day.
- Hopefully better attendance by more alumni/ae advisors next year.
- It would be helpful to have this program earlier in the academic year.

### For more information please contact:

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vojta@rci.rutgers.edu



# **UCLA Alumni Advisor Education Series (AAES)**

## **University of California, Los Angeles**

### **Abstract**

As a component of the UCLA Greek Education Program, the University offers alumni/ae volunteers a unique opportunity to “be on the cutting edge” in working with fraternity and sorority chapters. Through an on-going education series, which targets alumni/ae volunteers serving as chapter advisors, corporation officials, and resident advisors, the University can assist those alumni/ae working with undergraduate chapters. There are many program possibilities for the education series. The listing that follows represents a sampling of program concepts and titles that have been created for the education series. Through creative naming of the workshops, the intent is to generate interest and spark curiosity in order to build support and participation.

- Rules, Rules, and More Rules! Understanding University policies, procedures and resources to help make your job easier!
- Oh God, were we like that? Understanding the 18-23 year old...adult or adolescent!
- Who’s Suing Who? Risk management and other legal affairs...exploring your liability as an advisor.
- You did what??? Responding to minor and major crises that occur in fraternity and sorority life.
- Hazing ...the legacy: Breaking with tradition – implications for new membership procedures and education
- What a group! Understanding group dynamics and group facilitation skills
- It’s a different time and place... the psychological challenges of today’s student. Understanding the pressures and stress facing today’s college-age students.
- Shut up and listen! Exploring communication gaps and how to bridge them.
- What happens if? Preparing for the unexpected – reviewing chapter crisis and emergency response plans.
- How are your advising skills? A refresher course on working with today’s undergraduate students.
- A Meeting of the Minds! Building a dialogue between our fraternity/sorority alumni/ae and current undergraduate chapter leaders.
- Yeah, BUT... Conflict resolution in sorority and fraternity life. Teaching students to confront one another.
- “But it’s always been that way.” The ramification of sticking to the “old ways of doing things”...two years doesn’t always mean tradition.

- Multiculturalism as a reality! Implications for increased diversity in our chapters.
- Love Thy Neighbor...strengthening our Community Relations.
- Male/Female Relations Revisited. Acquaintance rape as a real issue for students.
- Sex as an “ism” in the 90’s! Times have changed and it’s important to understand the issues that today’s students are facing.
- A Time NOT to Lead! Alcohol use and abuse and its impact on the fraternity/sorority community. The reality of campus statistics.
- The Hidden Membership: Gay, lesbian, and bi-sexual members and their presence within our chapters... combating homophobia!
- Freedom of Speech or Politically Correct? Verbal and written expression that impacts the campus community.
- HIV/AIDS and Today’s College Student: The reality of HIV infection and undergraduates on our campus.
- Under the Influence...Why students make the choices they do when under the influence of their peers!
- Making the Grade! Scholarship and its role in our chapters. Increasing academic accountability with our brothers and sisters.
- Today’s Student! Who’s coming to UCLA and what are the implications for membership recruitment in the new millennium?
- A House is Just a House... Competitive housing options for students and how fraternity/sorority living stacks up against their competitors.
- Adding to the Alumni/ae Ranks: Maintaining alumni/ae relations programs that are effective while increasing your advisement pool.
- Money, Money, Money: Are we truly affordable organizations? Looking at the financial “big picture.”
- Healthy Choices: A look at personal health and lifestyles for today’s undergraduates.
- Why reinvent the wheel? Officer transition as a necessity for effective management of a chapter.
- Tomorrow’s Leaders: Developing good leaders within our chapters today!
- “These Times, they are a changin’”... Planning for our future!
- Building the Greek Image: Effective public relations and building pride within the fraternity/sorority community.
- Other Campus Organizations Exist! Over 500 to be exact. ..How to get members involved outside the fraternity or sorority. Experience the pay-off!



## **Context**

In the early 1990's, UCLA Fraternity and Sorority Relations (FSR) found a need to better partner with our alumni/ae volunteers. What had been primarily an adversarial relationship was ineffective towards working with our undergraduate leaders and chapters. The FSR unit was merged with the campus student activities office and new opportunities to outreach and change “the old way of doing things” emerged. Thoughtful and forward-thinking discussion brought forth the idea to bring chapter advisors closer to the University by providing current information and resources through a structured format. The idea of a “certification program” soon became an “education series”.

## **Desired Outcomes**

Our goal is: To assist and facilitate chapter advisors in acquiring the skills and information necessary to effectively work with today's undergraduate fraternity and sorority. Specifically, the program strives to:

- Develop an understanding of the role the University plays in advising and supporting Greek-letter organizations
- Increase the effectiveness of alumni/ae advisors
- Build skills that enable an advisor to help chapter members grow and learn in a positive atmosphere
- Expose alumni/ae to the numerous campus resources and departments that can assist in the daily advisement of a chapter
- Establish a partnership between undergraduate chapter leadership, alumni/ae volunteers, (inter)national representatives and the University
- Expose advisors to a better understanding of current issues which effect fraternities and sororities, the campus community and our society
- Produce greater interaction and familiarity among advisors

Time has been the best judge of progress. Now in our 9th year of providing this series, we have continued success. Our goals are regularly met in the education series and we have presented over 35 programs to date. Our working relationships with advisors are strong and healthy as a result of this service we provide. The nature of discussion and openness about the program topics and their applicability, keep advisors engaged and attending.

## **Target Audience**

All alumni/ae volunteers associated with fraternity and sorority chapters. We began with only chapter advisors and resident advisors as our focus. This was then expanded to include corporation officials and faculty advisors (if applicable).

### **Cost Effectiveness**

Costs are minimal and manageable with approximately \$500 spent. The primary program expenses are:

Photocopying; program announcements and mailers, handouts, and materials

Postage; program announcements/response forms

Program Supplies; nametags, folders, audio visual equipment

Food/Beverage; beverages (soda, coffee, tea), snacks and/or light food

We are a residential fraternity/sorority community and the past two years we have had house corporations sponsor and fund dinner meetings as an added incentive. This makes the evening's program more enticing to alumni/ae if they are commuting to campus following a workday.

### **Replicability**

UCLA Fraternity and Sorority Relations has presented several times at the NIC/AFA Annual Meeting on the program concept and replicability. It is a simple concept that can be easy to start and maintain for a campus. We present a variety of topics that are of universal concern and applicability in the fraternity/sorority world.

### **Evidence of Success**

Alumni/ae are closer to the University and the desire to have mutual partnerships has been a rewarding outcome. Program evaluations continue to show the program's success and the desire to continue. We have both regular attendees and those who attend when available. The interaction is positive and the issues can be hard hitting, which we believe increases the overall effectiveness of our alumni/ae volunteers. We actively communicate the program goals, objectives, and timelines with Inter/National Headquarters, which in turn, many send letters of support to our alumni/ae. This further infuses the necessity of our mutual partnership.

#### **For more information please contact:**

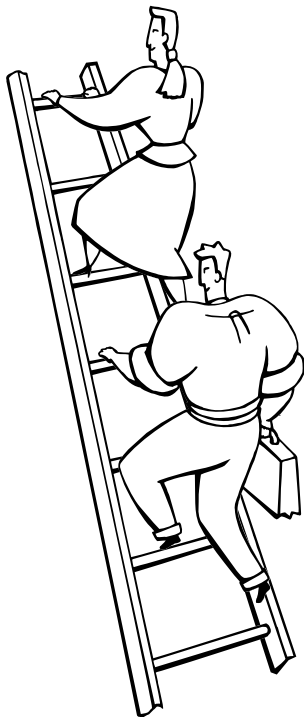
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Fraternity & Sorority Relations  
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Los Angeles, CA 90095-1376  
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scarter@saonet.ucla.edu

# Alumni Advisory Team

## University of Louisiana –Lafayette

### Abstract

All it takes is one person, an advisory team chair, to get started. Once the individual has committed to leading the program, make sure that he/she is armed with appropriate training materials. Extensive training must take place with the chair since this is the person who will train the advisory team. He/She should set up an infrastructure that will facilitate communication like setting up an email group to keep the advisors connected, to send e-mail meeting minutes, and to announce upcoming events.



Define the roles of the advisors. This will foster their commitment and facilitate the recruitment process. It is important that the chairman discuss the role the chapter must take in recruiting advisors. The students must be part of the process and share ownership. Some ideas for recruiting advisors include: meeting informally at alumni/ae gatherings, obtaining a geographic listing of area alumni/ae from the headquarters, calling and personally meeting with alumni/ae in the area to discuss the benefits of volunteering, advertising in the alumni/ae newsletter, and holding an initial informational meeting.

All interested alumni/ae should fill out a volunteer interest form providing the chairman with useful information to help place the individuals with an office that meets his/her expertise and interest. Once the form is complete, set up a one-on-one training session to discuss the program, their role on the team, review training materials and the resources available to them as an advisor. It is critical for the chapter officers to engage the advisors and meet with them to keep their interest. Alumni/ae who wish to volunteer are pulled in several directions by work and family demands. Keep the meetings to a minimum and make them highly organized.

### Context

An alumni/ae volunteer who was working with a high-risk chapter initially developed this program. In an effort to establish a blueprint for alumni advisors, the volunteer combined information gathered from the general fraternity, campus resources, and most importantly mistakes. The manual was later reviewed by a chapter president who contributed heavily to the content.

## **Desired Outcomes**

- To develop a program benefitting undergraduate officers and members and be rewarding for the volunteer. To accomplish this, the program included information to guide the volunteers in advising the student officers. The impact expected from the volunteers' support was to assist the chapter leadership in making ethical decisions. In addition, the volunteers would be available to enhance the students' leadership skills and assist with officer transition.

## **Target Audience**

Area alumni/ae interested in spending their time advising a chapter.

## **Cost Effectiveness**

The main resource needed for the program is the time valuable time of an enthusiastic alumnus, successful in his or her career and respected by the undergraduates. In addition, the program requires the printing of training materials for the volunteers.

## **Replicability**

The challenge with replicating this program is identifying proactive alumni/ae with the time to spearhead such a program. University sponsored training and recognition would greatly enhance the chapter's ability to recruit alumni/ae to spearhead the program. Campus advisors could help screen the alumni/ae who volunteer to assure that they would set a positive example for the students.

## **Evidence of Success**

The concepts used in the program have had a profound impact on two chapters and significant headway has been made in the identification and recruitment of new volunteers. The criteria for success includes the following:

The support of the undergraduate students into the value of the program

The recruitment of a chairperson to spearhead the initiative

The identification and recruitment of volunteers to mentor officers in areas related to their careers and/or expertise

The retention of these volunteers

The use of the volunteers, by chapter officers, as a resource

### **For more information please contact:**

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115 Caladium Court  
Lafayette, LA 70508  
337/406-2447  
[chipcouncil@cox-internet.com](mailto:chipcouncil@cox-internet.com)

# Campus Alumni/Alumnae Advisor Association Purdue University

## Abstract

The program is called “Purdue University Greek Advisors Association,” and is loosely based on an Alumni IFC model. The organization is open to any advisor involved with a fraternity/sorority at Purdue. Participants include chapter advisors, finance advisors, corporation presidents, house directors, property managers, recruitment advisors, etc. Everyone is welcome to join. The organization assesses voluntary dues to all corporation boards of \$30 per year.

The organization elects a chair and treasurer from the membership. At times there have been co-chairs (one male and one female). The University fraternity/sorority advisor serves as advisor. Committee chairs are appointed as needed.

The organization acts as a source of support for advisors. During active years, the organization meets monthly at lunchtime with a speaker or topic to discuss. Meetings are held at various chapter houses or on campus. During less active years, meetings are held quarterly on a weeknight. Occasionally meetings are scheduled in Indianapolis to accommodate more alumni participation. Quarterly newsletters and program announcements are mailed to all chapter advisors, corporation board presidents, house directors, etc.

The organization assists the undergraduates by sponsoring speakers, workshops, and assisting with events like the annual fraternity/sorority awards night. Awards judges, workshop facilitators, speakers, and corporate sponsorships are cultivated through the campus advisor association.

## Context

- Need existed to pool resources and improve communication with alumni/ae advisors
- University staff could not handle all issues within the fraternity/sorority community, so alumni/ae advisors created a forum to discuss issues and address problems within chapters
- New advisors needed a support group and basic training for their positions -this group provides that network

## Desired Outcomes

- Increase communication between the university and alumni/ae, and between alumni/ae themselves
- Pool resources for more effective and efficient programming for both alumni/ae and undergraduates

- Bringing fraternity and sorority alumni/ae together to discuss common issues
- Completion of annual financial surveys and “how do you do this or that” type questions
- Development of fraternity/sorority educational endowment (not yet accomplished)

### **Target Audience**

All advisors at any level of a fraternity/sorority organization.

### **Cost Effectiveness**

The university provides support for meeting space, mailings, and copies.

Advisor’s corporation board pays a \$30 per year membership fee to PUGAA –  
\$30 x 65 chapters= \$1,950 maximum annual budget

In past years the budget was used to provide speakers for the fraternity/sorority community, co-sponsor the annual fraternity/sorority awards banquet or provide annual scholarships to deserving student leaders.

### **Replicability**

Some form of an alumni/ae IFC/Panhellenic/NPHC can be utilized in any location, depending on the needs and interest at a particular campus. Also instead of creating a brand new structure, existing organizations (such as a nearby Alumnae Panhellenic Council) can be approached for partnership events. Creating a larger community-wide advisor network may be accomplished by growing existing organizations/programs. Do not make this harder than it has to be.

### **Evidence of Success**

Success is in direct proportion to volunteer leadership of the group and advisor interest. Program has been most successful for fraternity advisors. Sorority advisors and house directors are not involved to the same level as fraternity advisors.

**For more information please contact:**  
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West Lafayette, IN 47907-1096  
765/494-1231 • 765/496-1902 (fax)  
robison@purdue.edu

# DESIGN

## Advising Expectations Sample Workshop Outline

### **5/5 Introduction/Shared Expectations**

Introduce yourself and this session by talking about the importance of shared expectations between advisors/volunteers and undergraduate students.

### **15/20 Student/Advisor Expectations Worksheet**

Ask participants to turn to the Student/Advisor Expectations Worksheet (page 44) at this time. They should take a few moments to write down their perceptions. What do they think undergraduates expect of them? What do they expect from the undergraduates?

Partner Share: Ask participants to pair up with another volunteer and create a combined list. Give 10 minutes for this discussion.

### **5/25 Shared Expectations**

Ask a few volunteers to first share the expectations they think collegians have of them to create a master list on flipchart paper. Ask a few volunteers to share what they expect from the collegians. Refer to the Shared Expectations (page 45) to supplement the discussion.

Transition to the next segment.

### **10/35 Meeting those Expectations**

Share the following points:

- The role of the advisor may be directive or passive or somewhere between these extremes according to what is comfortable to the individual. Advisors are not expected to assume leadership of a chapter but are encouraged to work closely with officers and to offer their own input into chapter decision-making.
- In order to create mutual expectations, sometimes it is helpful to have a tool for discussion with the undergraduates. One tool that many campus advisors use is a written Student Advisor Agreement.

Share Student Advisor Agreement (see pages 46-48).

The Student Advisor Agreement is a working tool that you can adapt. An advisor and collegians should have an open, honest relationship and have the opportunity to share ideas, receive feedback, and build trust. This Agreement simply helps to start the conversation.

#### **10/45 Process/Debrief**

Debrief the use of this document by asking the following questions:

“What are the benefits of this type of agreement?”

“What are other ways to have this conversation without the agreement?”

“How can you best meet the expectations of the undergraduates while still maintaining your home life, professional work, spiritual life, and inter/national organizational responsibilities?”

#### **10/55 Best Practices: Open Discussion**

Ask the advisors for their own ideas and helpful hints. Ask them for their own best practices for effectively meeting expectations and providing accountability in the chapter.

#### **5/60 Closure**

Share the following points:

- One of the most challenging aspects of advising a chapter is balancing the tasks you need to complete your job as a chapter advisor with creating and maintaining relationships with undergraduate members.
- Task-oriented behaviors ensure that the group’s task will be accomplished. Maintenance behaviors ensure that good working relationships are maintained within the group.

Ask, “In your experience, what has been your balance between these two sets of behaviors?”

- A successful advisor pays attention to both of these areas. You may occasionally take some quiet time to think:  
Which behaviors am I over-using with this chapter?  
Which behaviors am I under-using with this chapter?

Close the session with the following quote:

“We don’t always know whose lives we touched and made better for having cared because actions can sometimes have unforeseen ramifications. What is important is that you do care and you act.” -Charlotte Lunsford

# Advising Expectations

## Student/Advisor Expectations Worksheet

Expectations I Have of Collegians:

Expectations I Believe Collegians  
Have of Me:

1.

1.

2.

2.

3.

3.

4.

4.

5.

5.

6.

6.

7.

7.

8.

8.

9.

9.

10.

10.



# Advising Expectations

## Shared Expectations

The advisor and student should have an open, honest relationship and have the opportunity to share ideas, receive feedback, and build trust. This responsibility of relationship building rests within each individual. In order to recognize each others' various roles and responsibilities, time should be taken to discuss expectations. Some advisors provide a simple list of expectations for all organizational leaders such as:

1. Create some “How are you doing?” time.
2. Review the last meeting and any issues that need follow-up.
3. Discuss the agenda for the next meeting.
4. Talk about areas of concern.
5. Share successes.
6. Discuss group dynamics.
7. Support the chapter during challenging times.
8. Serve as a reality check for organizational policies and procedures.
9. Challenge the leaders and members to continually strengthen the chapter and help to provide a healthy, safe, and positive fraternal experience.
10. Serve as a coach and mentor to chapter leaders.
11. Serve as a role model for life-long membership.

# Advising Expectations

## Sample Student/Advisor Agreement

This agreement is designed to enhance and strengthen the relationships between the advisor and the members of the chapter. It describes the expectations, responsibilities, and rights of both parties. If you are an experienced advisor or don't feel the need for a written document, this could be used as a good tool for discussion.

This could also be used as a tool for evaluating the relationship between the advisor and the members of the organization. It could be used as a guideline for establishing boundaries and parameters for both the members and the advisor. You might want to review the document after the officer training and transition period and add or delete any statements with each new team of officers. Work together with committee leaders or the executive board to discuss specific rights and responsibilities you would add in Section II.

### **Section I: General Rights and Responsibilities of the Advisor**

1. The advisor is expected to understand the purpose and objectives of the general fraternity/sorority and the chapter.
2. The advisor is expected to have or obtain knowledge about college/university policies and procedures that impact student organizations.
3. The advisor is expected to have or obtain knowledge about general fraternity/sorority policies and procedures that impact undergraduate chapters.
4. The advisor is expected to attend regular chapter meetings and functions. Specific details may be included in Section II.
5. The advisor is expected to assist in the negotiation of contractual agreements entered into by the chapter.
6. The advisor is expected to encourage members to take advantage of opportunities to enhance their leadership and group skills.
7. The advisor is expected to provide assistance in the areas of budget development, major expenditures, and financial record keeping.
8. The advisor is expected to provide positive and constructive feedback and confront inappropriate behavior in members which he/she deems to be detrimental to the individual and/or other members of the organization.

9. The advisor is expected to treat members as mature individuals who possess dignity, worth, and self-direction.
10. The advisor has the right to a private life.
11. The advisor has the right to disagree with chapter decisions.

## **Section II: Specific Rights and Responsibilities of an Advisor**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

## **Section III: General Rights and Responsibilities of Chapter Members**

1. Members are expected to understand the purpose of the general fraternity/sorority and pursue activities which fulfill its purpose. It is understood that the objectives of the chapter will be compatible with the objectives of the general fraternity/sorority and the college/university and not in violation of college/university, local, state, and federal regulations and statutes.
2. Members are expected to attend meetings and functions. Specific details can be included in Section IV.
3. Officers are expected to inform and involve members and the advisor prior to making any financial commitments. The advisor and the members of the chapter may wish to define what expenditures should be reviewed by the advisor (use Section IV).
4. Members are expected to take advantage of opportunities to enhance their skills (i.e. participation in convention, national leadership academy, regional leadership programs, etc.).

5. Members are expected to provide positive and constructive feedback and confront inappropriate behavior in other members and the advisor which they deem to be detrimental to that individual and/or the chapter.
6. Members are expected to treat the advisor as an individual who possesses dignity, worth, and self-direction.
7. Members have the right to be listened to by other members and the advisor.
8. Members have the right to choose their levels of involvement in the chapter.
9. Members have the right to voice their disagreements with the decisions of the advisor and appeal those decisions to a predetermined higher authority (use Section IV).

**Section IV: Specific Rights and Responsibilities of Chapter Members**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

This agreement is binding until \_\_\_\_\_ (date), or until a new agreement is developed.

Signed:                      \_\_\_\_\_                      \_\_\_\_\_  
   Advisor    Chapter committee chair, officer

(Source: Virginia Commonwealth University)

# Assessing the Success of Your Program

## Sample Evaluation 1

Please rate the following (using a scale of 1-4). 1= Poor, 2= Fair, 3= Good, 4= Excellent. Please circle your response.

### Logistics

Date	1	2	3	4
Time	1	2	3	4
Location	1	2	3	4
Price	1	2	3	4
Promotional materials	1	2	3	4
Additional comments:				

### Speaker: \_\_\_\_\_

Content	1	2	3	4
Clarity	1	2	3	4
Knowledge of subject	1	2	3	4
Use of visual aids	1	2	3	4
Effectiveness of handouts/materials	1	2	3	4
Overall effectiveness	1	2	3	4
Additional comments:				

Did this program meet the learning outcomes as described in our promotional materials?

List learning outcome here	Yes	No
Learning outcome #2	Yes	No
Learning outcome #3	Yes	No
Learning outcome #4	Yes	No

What I valued most about the program:

What I valued least about the program:

Additional topics I am interested in:

## Assessing the Success of Your Program

### Sample Evaluation 2

	Excellent	Good	Average	Below Average	Poor
Program Overall	5	4	3	2	1
Program Met Objectives	5	4	3	2	1
Appropriate Time Allocation	5	4	3	2	1
Handout Materials	5	4	3	2	1

Name: \_\_\_\_\_

<b>Speaker #1 Evaluation</b>	Excellent	Good	Average	Below Average	Poor
Speaker Overall Evaluation	5	4	3	2	1
Use of Audio-Visual Materials	5	4	3	2	1
Practical Information	5	4	3	2	1
Organized Presentation	5	4	3	2	1
Credible Information	5	4	3	2	1
Presentation Style	5	4	3	2	1
Information at Appropriate Level	5	4	3	2	1

Name: \_\_\_\_\_

<b>Speaker #2 Evaluation</b>	Excellent	Good	Average	Below Average	Poor
Speaker Overall Evaluation	5	4	3	2	1
Use of Audio-Visual Materials	5	4	3	2	1
Practical Information	5	4	3	2	1
Organized Presentation	5	4	3	2	1
Credible Information	5	4	3	2	1
Presentation Style	5	4	3	2	1
Information at Appropriate Level	5	4	3	2	1

Please offer comments to elaborate on scores. Also, please describe any unanswered questions or suggestions for future topics: