



# FACILITATOR GUIDE

2020 EDITION  
SIX-WEEK VERSION



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# LETTER FROM THE CHIEF EXECUTIVE OFFICER

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Brother Warden,

Congratulations on your recent election! Whether you are new to your position or beginning another term, your new responsibilities will challenge you to learn, grow, and meet your potential as a leader. While at times it may be difficult, know that it will be fulfilling. When your chapter members call you years down the road and thank you for guiding and assisting them in their journey to become brothers of Pi Kappa Phi, you will feel the well-deserved sense of accomplishment of a job well done.

Authorized in December 2018, the Model Associate Member Education Program is a shared associate member education experience that helps our newest members understand the distinctions between friendship and brotherhood, learn about the legacy forged by our founders, and begin practicing leadership from their earliest moments of membership.

After listening to feedback from chapter leaders across the nation, the Model Associate Member Education Program has been revised. While the following pages of this facilitator guide will describe the major changes, know that this edition is designed to continue to empower your New Member Education Committee to teach Fraternity in compelling and engaging ways.

In his inaugural address, National President Jeremy D. Galvin, Alpha Omicron (Iowa State), challenged all members to treat others with dignity and respect, stand up for what they know to be right, and promote Pi Kappa Phi. We must all rise to National President Galvin's challenge. Promote healthy, positive, and lifelong friendships between all members, confront and hold accountable those members who fail in their obligations to Pi Kappa Phi, and embody the values espoused by our Ritual of Initiation.

If you have any questions about the Model Associate Member Education Program, to include any modifications authorized by the National Headquarters for use within your chapter, please do not hesitate to contact your Chapter Relationship Manager or Leadership Consultant.

Yours in Pi Kappa Phi,



Mark E. Timmes  
*Chief Executive Officer*

# WHERE WE STAND ON HAZING

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The Supreme Chapter and the National Council of Pi Kappa Phi Fraternity unequivocally oppose all acts of hazing. The national fraternity, as well as most universities and states, define hazing as any action taken or situation created intentionally, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment or ridicule, regardless of a person's willingness to participate. While the fraternity's risk management policy provides a list of activities that may constitute hazing, Pi Kappa Phi expects its chapters to provide an atmosphere where all members, associate members and guests feel safe by ensuring respect for human dignity is a chief priority. Additionally, members of the Fraternity are expected to hold each other accountable to our shared standards.

All alleged incidents of hazing will be investigated and adjudicated in accordance with the fraternity's disciplinary code. Any member found in violation of Pi Kappa Phi's hazing policy will be sanctioned in accordance with the code. Such sanctions may include suspension and expulsion from the fraternity.

**Members and associate members who are aware of behavior that is inconsistent with this statement or Pi Kappa Phi's hazing policy should contact the fraternity's National Headquarters at (704) 504-0888.**

## RISK MANAGEMENT POLICY

Adopted in February 2019, Pi Kappa Phi's risk management policy states: "Any event or activity related to the new member joining process (e.g., recruitment, intake, rush, etc.) must be substance free. No alcohol or drugs may be present if the event or activity is related to new member activities, meetings, or initiation, including but not limited to 'big night,' 'Big/Little' events or activities, 'family' events or activities, and any ritual or ceremony."

Additionally, the risk management policy states: "No chapter, associate chapter, student, alumnus, or volunteer shall conduct nor condone hazing activities. Permission or approval by a person being hazed is not a defense. Hazing activities are defined as:

"Any action taken or situation created, intentionally, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment, or ridicule. Such activities may include but are not limited to the following: use of alcohol; paddling in any form; creation of excessive fatigue; physical and psychological shocks, quests, treasure hunts, scavenger hunts, road trips, or any other such activities carried on outside or inside of the confines of the chapter house; wearing of public apparel that is conspicuous and not normally in good taste; engaging in public stunts and buffoonery; morally degrading or humiliating games and activities; and any other activities that are not consistent with academic achievement; fraternal law, ritual, or policy; the regulations and policies of the educational institution; or applicable state law."

Pi Kappa Phi's complete risk management policy can be found on the Pi Kapp Resource Library: [pikapp.org/resources/resource-library](http://pikapp.org/resources/resource-library).

# INTRODUCTION TO THE MODEL PROGRAM

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The health, safety, and well-being of our associate members is of utmost importance and a priority to the National Council. After observing a substantial increase in the frequency of hazing incidents and decreasing tolerance for high-risk behaviors, the National Council authorized the creation and use of the Model Associate Member Education Program for all chapters beginning August 1, 2019.

The Model Associate Member Education Program is Pi Kappa Phi's shared associate member education and brotherhood experience. It is designed to help our newest members understand the distinctions between friendship and brotherhood, learn about the legacy forged by our founders, and begin practicing leadership from their earliest moments of membership.

All chapters are expected to follow the model program.

## Modifications

While the Model Associate Member Education Program is a shared associate member experience for all members nationwide, the National Headquarters recognizes that some changes may need to be made from chapter to chapter.

To that end, the 2020 edition of the Model Associate Member Education Program contains pre-authorized modifications. These modifications have already been authorized for use by the National Headquarters; your chapter may use as few or as many as you like. All your chapter needs to do to use them is submit them with your program dates on Chapter Gateway. To see how to submit your associate member education program dates, visit the Pi Kapp Resource Library: [pikapp.org/resources/resource-library](http://pikapp.org/resources/resource-library).

Note that, unless previously approved in writing on or before August 1, 2019 by the National Headquarters, your chapter may not make modifications to the Model Associate Member Education Program other than those designated as pre-authorized modifications.

## Resources & Training

In the 2020 edition of the Model Associate Member Education Program, all handouts and reference materials have been moved to the Pi Kapp Resource Library. To access them, go to the "Warden" or "Associate Member Education" tabs. It is the responsibility of the chapter to provide physical copies of handouts to associate members, unless you choose to direct associate members to the digital versions (see pre-authorized modifications for each week).

If you have questions about the best practices relating to the planning and execution of the Model Associate Member Education Program, you can contact your Leadership Consultant or Chapter Relationship Manager.

# WHAT'S DIFFERENT IN THIS EDITION?

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When first introduced in 2019, the Model Associate Member Education Program made many changes to some of Pi Kappa Phi's long-held traditions. Some of these changes included reducing the length of associate member education to six weeks, replacing oral boards and the written exam with the Capstone Project, and moving to two education sessions each week.

The 2020 edition of the model program was created after collecting feedback from chapter leaders across the nation. The major changes in the 2020 edition are noted below:

- Pre-authorized modifications that maintain the integrity of the curriculum and offer meaningful choices for leaders looking to tailor the associate member education experience to the preferences of their chapter members;
- An associate member retreat occurring during Week Two: An Uncommon Brotherhood to reinforce the development of positive and meaningful relationships that promote the dignity and respect of all members;
- An exploration of brotherhood as the sum of four major themes measured by Dyad Strategies, in partnership with the Fraternity: shared social experiences, solidarity, belonging, and accountability;
- A friendship visit occurring during Week Four: Exceptional Leadership to foster an emotional connection between associate members and The Ability Experience while helping them understand the importance of responsible citizenship;
- An alumni panel occurring during Week Five: Your Journey to help associate members process the impact and benefits of lifelong membership in Pi Kappa Phi while also offering alumni a forum to share their experience and wisdom with our newest members;
- A re-imagining of the Capstone Project that better guides the New Member Education Committee and associate members through the entire project, start to finish;
- Moving back to one education session each week in an effort to respect the competing commitments of all members and guests; and
- Increased involvement from Big Brothers in associate member events and activities.

If you have questions about how any of these changes impact your chapter, contact your Leadership Consultant or Chapter Relationship Manager.

# FACILITATION TIPS & BEST PRACTICES

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The New Member Education Committee is tasked with teaching Fraternity in compelling and engaging ways. To do so, each member of the committee should be familiar with the tips and best practices of effective facilitation.

To be an effective committee, it is important to understand the difference between teaching and facilitating. Teaching is designed to help one or more learners gain knowledge, skills, and attitudes to improve performance on a specific task or responsibility. Facilitation, on the other hand, is the art of helping a group of people decide what results they want to achieve, how they want to achieve them, and supporting them as they work to achieve their goals. Unlike teachers, facilitators are not always the subject matter experts.

Associate member education will blend teaching and facilitation to give associate members the knowledge, skills, and attitudes to be successful brothers of Pi Kappa Phi while also helping them learn about themselves and empowering them to practice leadership from the earliest moments of membership.

When thinking about facilitation, keep the following tips in mind:

Effective Facilitators DO:	Effective Facilitators DON'T:
<ul style="list-style-type: none"> <li>• Come to each session prepared.</li> <li>• Begin and end on time.</li> <li>• Come energized.</li> <li>• Involve their learners.</li> <li>• Integrate current events into conversations.</li> <li>• Maintain the integrity of the curriculum.</li> <li>• Use the entire room.</li> <li>• Speak with conviction.</li> <li>• Challenge participants to consider different points of view.</li> </ul>	<ul style="list-style-type: none"> <li>• Make the lessons about them.</li> <li>• Speak with caution.</li> <li>• Fake it.</li> <li>• Speak down to participants.</li> <li>• Let participants shy away from difficult conversations.</li> <li>• Make excuses.</li> <li>• Give wrong answers or incorrect information.</li> </ul>

If your New Member Education Committee has questions about additional tips and best practices for effective facilitation, contact your Leadership Consultant or Chapter Relationship Manager.



# USING THIS FACILITATOR GUIDE

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Please review this key to understand how the facilitator guide is formatted. Note the amount of time each section should take, as well as the difference between speaking prompts and notes.

This facilitator guide will help you plan for and execute the Model Associate Member Education Program. All handouts and reference materials noted in the curriculum can be found on the Pi Kapp Resource Library under the “Warden” or “Associate Member” tabs.

If you have questions about the format of this facilitator guide or content of the model program, please contact Director of Member Development Dylan McKenzie ([dmckenzie@pikapp.org](mailto:dmckenzie@pikapp.org)).

## SESSION TITLE (Session Time)

### Learning Objectives

- Learning objectives for each session will be listed at the beginning of that session.

### Setup Instructions & Supplies Needed

- Instructions for room set-up will be noted here.
- Additionally, supplies needed will be listed here.

## Section Title - amount of time (# minutes)

**Bold text, like this, will denote questions to ask and points to make verbatim.**

- Bulleted, non-bold text like this will contain notes and instructions for you.
- The word **FLIP CHART** will cue you to write something down on a flip chart or whiteboard for the entire associate member class to see.

# SIX-WEEK EXAMPLE SCHEDULE

	<b>Week One: Orientation to Pi Kappa Phi</b>	<b>Week Two: An Uncommon Brotherhood</b>	<b>Week Three: Our Founders' Legacy</b>
<b>Activities &amp; Lessons</b>	<p>Welcome &amp; Introductions</p> <p>Program Overview</p> <p>Creating Shared Expectations</p> <p>The Obligations of Membership</p> <p>Pi Kappa Phi's Rules &amp; Policies</p> <p>Week One Wrap-Up</p>	<p>Retreat Welcome</p> <p>The Themes of Brotherhood</p> <p>Exploring Shared Social Experiences</p> <p>Exploring Solidarity</p> <p>Exploring Belonging</p> <p>Exploring Accountability</p> <p>Week Two Wrap-Up</p>	<p>Week Three Welcome</p> <p>History Trivia</p> <p>Values of Pi Kappa Phi</p> <p>Personal Values</p> <p>Values into Action</p> <p>Week Three Wrap-Up</p>
<b>Sub-Ritual</b>	Pre-Initiation Ceremony	Big Brother Ceremony	Ultimate Respect
<b>Homework</b>	<p>Complete the Little Brother Questionnaire.</p> <p>Familiarize yourself with the four themes of brotherhood.</p> <p>Familiarize yourself with the terms privilege, bias, diversity, inclusion, equality, and equity.</p> <p>Read Chapter Five: Accountability</p> <p>Claim your Pi Kappa Phi account.</p>	<p>Read Chapter One: Our Proud History.</p> <p>Familiarize yourself with your chapter's history.</p> <p>Familiarize yourself with Pi Kappa Phi's values.</p> <p>Memorize The Student Creed.</p>	<p>Read Chapter Seven: Responsible Citizenship.</p> <p>Familiarize yourself with Pi Kappa Phi's definition of leadership.</p> <p>Familiarize yourself with people-first language.</p>
<b>Capstone</b>	Identify three areas of interest for the Capstone Project and submit them to the New Member Education Committee.	Meet with your Capstone Project team to determine what impact you want to make in your area of focus.	Identify a significant figure in Pi Kappa Phi's history and describe how that person impacted the Fraternity.

# SIX-WEEK EXAMPLE SCHEDULE

<b>Week Four: Exceptional Leadership</b>	<b>Week Five: Your Journey</b>	<b>Week Six: The Second Decision</b>
<p>Week Four Welcome Leadership in Pi Kappa Phi The Ability Experience Preparing for the Friendship Visit Friendship Visit Friendship Visit Debrief Week Four Wrap-Up</p>	<p>Week Five Welcome Pi Kappa Phi Today Chapter Governance Alumni Panel Creating Your Journey Map Week Five Wrap-Up</p>	<p>Week Six Welcome The Second Decision The Obligations of Lifelong Membership Ritual of Initiation Pre-Brief Addressing Concerns Week Six Wrap-Up Candle Watch Ritual of Initiation Ritual Lecture &amp; Debrief</p>
<p>Man in the Glass</p>	<p>Water</p>	
<p>Read Chapter Two: Our Fraternal Organization. Familiarize yourself with Pi Kappa Phi’s symbols. Familiarize yourself with all Journey programs. Identify three Journey programs that interest you. Identify three questions to ask the alumni panel.</p>	<p>Read Chapter Eight: Lifelong Commitment. Read “My Name is Fraternity.” Read “You Are Always Wearing Your Letters.” Complete GreekLifeEdu: Part One</p>	
<p>Analyze your figure’s leadership style and determine how you can emulate their leadership style in your area of focus.</p>	<p>Draft your team’s Capstone Project presentation.</p>	<p>Deliver your Capstone Project Presentation.</p>





# WEEKLY OVERVIEW

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## OVERVIEW

During the first week of associate member education, our newest members will participate in the Pre-Initiation Ceremony, set expectations for themselves and for the chapter, review the obligations of membership, and begin to build lifelong friendships with all members of the chapter.

To prepare for this week's events and activities, the Warden should:

- Coordinate the planning of the Pre-Initiation Ceremony with the Chaplain.
- Ask the Archon or Chapter Advisor to introduce themselves and formally welcome associate members to the chapter following the Pre-Initiation Ceremony.
- Confirm that all associate member pins and copies of *The White Diamond* have been received by the chapter. This merchandise is typically ordered by the Archon, Treasurer, or Secretary.
- Gather all materials and supplies needed for the subordinate ritual, education session, and activities.

With all activities considered, the New Member Education Committee can expect to spend up to six hours planning and executing the programming for this week. Associate members can expect to spend up to four hours participating in associate member activities - including homework - this week.

### Pre-Initiation Ceremony (1 hour)

- Set-up (15 minutes)
- Performance (15 minutes)
- Debrief (15 minutes)
- Clean-Up (15 minutes)

### Education Session (1 hour & 35 minutes)

- Welcome & Introductions (20 minutes)
- Program Overview (10 minutes)
- Creating Shared Expectations (20 minutes)
- The Obligations of Membership (10 minutes)
- Pi Kappa Phi's Rules & Policies (15 minutes)
- Week One Wrap-Up (20 minutes)

# ORIENTATION TO PI KAPPA PHI

## EXAMPLE SCHEDULE

The schedule below represents an example of what Week One: Orientation to Pi Kappa Phi may look like when facilitated by a chapter. Note that the dates, times, and locations of subordinate rituals, education sessions, and quizzes for each week may be determined by the chapter, but all activities should start and end at a reasonable time.

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
MODEL PROGRAM	Pre-Initiation Ceremony			Education Session Quiz #1			Big Brother Orientation
CHAPTER ACTIVITIES	Associate Member Welcome Event Chapter Meeting			Brotherhood Event			

# WEEKLY OVERVIEW

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## CAPSTONE PROJECT CHECK-IN

Serving as the culmination of the associate member education process, the Capstone Project asks each associate member to analyze the leadership style of a significant figure within Pi Kappa Phi and describe how that figure impacted Pi Kappa Phi, then identify an area of personal interest or passion and describe how they will practice leadership and make an impact in that area.

Each week, this section will offer tips to the New Member Education Committee to ensure that associate members remain on-track with their Capstone Project.

### This Week: Orientation to Pi Kappa Phi

This week, associate members will be introduced to the Capstone Project. They will have the opportunity to review the project guidelines, ask any questions, and begin thinking about their area of passion or focus. Associate members may choose to focus on a particular area within the chapter, campus, or their local community.

When discussing the Capstone Project this week, it may be helpful to have a few examples prepared. While examples from other chapter members may be most impactful, a number of areas of interest or passion have been identified below for your reference:

- Environmental sustainability (campus or local community)
- Creating equity (chapter, campus, or local community)
- Mental health & mental illness (chapter, campus, or local community)
- Campus involvement (chapter)
- Values-based recruitment (chapter or campus)
- Continuous (aka 365) recruitment (chapter or campus)
- Creating a culture of volunteerism (chapter, campus, or local community)
- Raising awareness for people with disabilities (chapter, campus, or local community)

For additional questions about the specifications of the Capstone Project, the New Member Education Committee should contact Director of Member Development Dylan McKenzie ([dmckenzie@pikapp.org](mailto:dmckenzie@pikapp.org)).

### Next Week: Uncommon Brotherhood

After associate members submit their area of interest to the New Member Education Committee, the Warden should announce Capstone Project teams. The teams should be organized around areas of interest. During week two, associate member teams should meet and determine how they want to make change in their area of focus.



# ORIENTATION TO PI KAPPA PHI

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## UTILIZING GUEST FACILITATORS

Throughout the Model Associate Member Education Program, you may invite guests to facilitate specific discussions or activities. Guest facilitators are great resources and, in some cases, they may even be leveraged as subject matter experts (e.g. the Risk Manager discussing Pi Kappa Phi's risk management policy).

During Week One: Orientation to Pi Kappa Phi, you may consider inviting the following guests to facilitate sections of the curriculum:

- Archon or Chapter Advisor: opening remarks during Welcome to Pi Kappa Phi
- Standards Board Chairman: Obligations of Membership
- Risk Management Chairman: Pi Kappa Phi's Rules & Policies

When using guest facilitators, be sure to walk them through the facilitator's guide in advance of the meeting, reviewing any talking points or activities that they should facilitate. Additionally, remind guest facilitators to respect the integrity of the curriculum. Those who do not should not be asked to facilitate again in the future.

## PRE-AUTHORIZED MODIFICATIONS

While the Model Associate Member Education Program is a shared associate member education experience, each chapter may need to make changes to the program based on the needs of their members. The modifications below have been authorized by the National Headquarters for use by any chapter.

Choose from as many of the modifications below as you would like. If you select any of the modifications, be sure to include their selection as part of your program date submission on Chapter Gateway.

- Facilitate the expanded Pre-Initiation Ceremony instead of the standard ceremony.
- Direct associate members to the digital version of handouts instead of printing them.
- Offer a weekly take-home quiz instead of one taken in the education session.

**Note that, unless previously approved in writing on or before August 1, 2019 by the National Headquarters, your chapter may not make modifications to the Model Associate Member Education Program other than those listed above.**

# WEEK ONE

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## PRE-INITIATION CEREMONY (1 hour)

### Preparing for the Session

The setup instructions, supplies needed, and ceremony script can be found in the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*. When planning for the Pre-Initiation Ceremony, coordinate with the Chaplain to ensure all materials are collected and a room has been secured for the event.

As with any other subordinate ritual, the Pre-Initiation Ceremony is exoteric (not secret). Consider inviting members of the Council of Advisors, faculty, or even the parents of your newest associate members to participate in this first step of your associate member's journey in Pi Kappa Phi.

If your chapter does not have a copy of the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, you may order one by contacting your Leadership Consultant or Chapter Relationship Manager.

### Setup Instructions

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 35 (standard) or 37 (expanded).

### Supplies Needed

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 35 (standard) or 37 (expanded).

### Set-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the set-up of the Pre-Initiation Ceremony.
- To save time, the chapter may choose to facilitate the Pre-Initiation Ceremony in a separate room from the education session.

### Ceremony Performance - 15 minutes

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 35 (standard) or 37 (expanded).

# ORIENTATION TO PI KAPPA PHI

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## Pre-Initiation Debrief - 15 minutes

- Sample questions to debrief the Pre-Initiation Ceremony can be found on pages 40-41 of the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*.

## Clean-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the clean-up of the Pre-Initiation Ceremony.

# WEEK ONE

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## EDUCATION SESSION (1 hour & 35 minutes)

### Session Outcomes

As a result of participating in this education session, associate members should be able to:

- Build positive and meaningful relationships with other chapter members.
- Set and describe the shared expectations for the associate member class and for the initiated members of the chapter.
- Describe the time, financial, and academic obligations of membership for associate members.
- Communicate the basic rules and policies that members of Pi Kappa Phi are expected to follow.

### Preparing for the Session

#### Setup Instructions

- Tables and chairs set in a large horseshoe, or U, shape
- You will need access to flip chart paper or a whiteboard. When you should record something on the flip chart paper or whiteboard, the facilitator guide will prompt you with the following cue: **FLIP CHART**.
- If possible, you will want to prepare some flip charts prior to the retreat. Prepared flip chart paper should be hidden until you are ready to reveal them. Each of the prepared flip charts should contain the following information:
  - On two separate sheets of flip chart paper, write “Expectations for Each Other” and “Expectations for the Chapter.”

#### Supplies Needed

- One copy of the 2019 edition of *The White Diamond* for each associate member.
- Extra pens or pencils for associate members (if they lose theirs).
- Flip chart paper and markers.
- Copies of each of the following handouts for each associate member:
  - Capstone Project Guidelines.
  - GreekLifeEdu Associate Member Instructions.
  - Chapter constitution & bylaws.
  - Phinal Thought: Week One.
  - Little Brother Questionnaire.
  - Four Themes of Brotherhood.
  - Week One: Orientation to Pi Kappa Phi quiz.

# ORIENTATION TO PI KAPPA PHI

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## Welcome to Pi Kappa Phi - 20 minutes

- If you have asked the Archon or Chapter Advisor to share any opening remarks, allow them to do so here. Once they have shared their remarks, begin with the text below.

Welcome to Pi Kappa Phi! Regardless of the why you joined, our chapter is glad you are here.

Throughout the next six weeks, you will participate in an experience that will help you understand the distinction between friendship and brotherhood, learn about the legacy forged by our founders, and begin practicing leadership from your earliest moments of membership.

Before anything else, however, you should understand what fraternity is and what it is not.

“A house, a grip, a badge, a song, an emblem - these do not make a fraternity. It is the unseen things - friendship, brotherhood, character, honor, courage, ideals - these make the fraternity and the man.”

While the person who said this has been lost to time, their words continue to ring true.

What do you think they mean in their quote?

- Be sure to give associate members plenty of time to respond. Offer to restate or rephrase the question if necessary, but don't give associate members the answer unless it is clear that they do not understand the question.
- If associate members struggle to answer, share that any fraternity is defined by the values and relationships of its members.

One of the most important things we can do is build positive and meaningful friendships with one another. From there, we can begin to understand what brotherhood truly means.

While some of you may have had the opportunity to meet one another during the recruitment process, others may not have. For their sake, I want everyone to introduce themselves.

- Ask associate members to introduce themselves. When introducing themselves, they should share their name, year in school (e.g. freshman), major, and hometown.
  - If your chapter has an associate member class of ten (10) or less, consider asking associate members to share why they chose to join Pi Kappa Phi.
  - If your chapter has an associate member class of twenty-five (25) or larger, consider breaking associate members into smaller groups so that they have the chance to meet each other.

Now that we have had the opportunity to get to know one another a little better, let's dive into what the Model Associate Member Education Program will actually look like over the coming weeks.

# WEEK ONE

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## Model Program Overview - 10 minutes

Through the next six weeks, we will explore the characteristics that make our brotherhood uncommon, learn about the legacy of our Founders, discuss your journey in Pi Kappa Phi, empower you to practice leadership every day, and help you understand how to be a successful initiated member of this fraternity.

- Pass out one copy of *The White Diamond* (2019 edition) to each associate member.

These two books will be your primary resources throughout your associate member experience. *The White Diamond* was first authorized for publication in 1936 and contains invaluable information about the history and values of our organization. You will also receive a number of handouts throughout your associate member education process. It may be helpful to purchase a three-ring binder to keep these documents organized, especially as you reference them while planning your Capstone Project.

The Capstone Project is the culmination of the associate member experience. It will offer you the opportunity to lead real, meaningful change in our chapter, campus, or local community. Because it is such a large part of your experience, let's take the time to review it in detail.

- Pass out the Capstone Project Guidelines handout and ask associate members to silently read the guidelines.

What questions do you have about the Capstone Project right now?

The final thing you should know about the Model Associate Member Education Program is that you will be expected to complete weekly homework assignments and weekly quizzes. Each homework assignment is listed in your associate member guide. Quizzes will relate directly to the lessons of each week.

- Share how quizzes will be completed. You may choose any of the options below for your quizzes:
  - Electronic in education session
  - Paper copy in education session
  - Electronic take-home (pre-authorized modification)
  - Paper copy take-home (pre-authorized modification)

What questions do you have about what your associate member experience will look like over the next six weeks?

## Creating Shared Expectations - 20 minutes

I have spent a lot of time so far talking at you so far. Throughout your associate member education, however, you are going to be asked to participate in a number of activities, discussions, and self-reflections to build upon your relationships with one another and deepen your knowledge of the fraternity.

# ORIENTATION TO PI KAPPA PHI

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As we discussed before, a fraternity is only as good as the values of and relationships built between its members. If you have ever asked someone for relationship advice, you might have been told that the foundation of any relationship is trust.

How do we build trust?

- Acknowledge each answer provided by associate members, as there are many right answers to this question. For the purpose of your time together, however, share that building trust requires establishing and enforcing clear expectations.

With the understanding that trust is formed when we abide by a set of shared expectations, what are the expectations that you are willing to set and abide by as an associate member class?

- **FLIP CHART** responses. If you do not have flip chart paper available, consider using a whiteboard. Encourage associate members to identify seven expectations for one another before moving on.
  - Regardless of whether you use a flip chart or whiteboard, you will need to record these expectations for future weeks. Keep the paper or take a photo so that you can reference them later.
- If associate members struggle to name expectations for each other, consider sharing one or more of the example expectations listed below.
  - Be on time.
  - Respect others.
  - Be engaged.
  - Ask questions.
  - Be open to new perspectives and ideas.
- Ask all associate members to acknowledge that they can abide by these expectations by giving you a thumbs up.

I'm glad that we have identified these expectations for one another. It's important to acknowledge that, by signing your bid, you became a member of this chapter. As a member of this chapter, you have every right to set expectations not just for the men in this room, but for the initiated members as well.

With that in mind, what expectations do you want to set for the initiated members of the chapter?

- **FLIP CHART** responses on a new sheet. If you do not have flip chart paper available, consider using a whiteboard. Encourage associate members to identify seven expectations for the chapter before moving on.
  - Regardless of whether you use a flip chart or whiteboard, you will need to record these expectations for future weeks. Keep the paper or take a photo so that you can reference them later.
- If associate members struggle to name expectations for each other, consider sharing one or more of the example expectations listed below.

# WEEK ONE

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- Treat us with dignity & respect.
- Empower us to lead in the chapter.
- Help us process weekly lessons and activities.
- Provide honest, constructive, and timely feedback to us.
- Help us feel welcome in the chapter.

Thank you, gentlemen. I will share your expectations with the Executive Council and chapter during the next chapter meeting. Having set expectations for the chapter, please know that there are some things that your chapter brothers - and Fraternity - will expect from you.

## The Obligations of Membership - 10 minutes

- If you have asked the Standards Board Chairman to be a guest facilitator, allow them to take over here. Be sure to remind them to introduce themselves, if necessary.

The expectations of each member of Pi Kappa Phi are described by The Student Creed, which was authored by National Historian J. Friend Day, Eta (Emory) in 1932.

- Instruct associate members to reference The Student Creed on page 1 of their copy of the 2019 edition of *The White Diamond*.
- Ask for volunteers to read each stanza of The Student Creed.

**What does The Student Creed ask each member to do?**

- Be sure to touch on each of the obligations listed below:
  - Put the good of the fraternity before yourself.
  - Pay your dues on time, every time.
  - Don't settle for mediocrity; achieve your potential.
  - Follow our rules and regulations.
  - Participate in campus events and activities.
  - Give back to your campus and local community.
  - Work to better your fraternity every day.

The Student Creed is a daily reminder of each member's obligations to the Fraternity. These obligations may seem like a lot right now, but we are going to spend the rest of your time as an associate member exploring what they mean for you and for the other members of this chapter.

Before we move on, though, it's important to acknowledge some of the basic obligations of membership in this chapter:

- Share the time, academic, and financial expectations of all associate members.



# ORIENTATION TO PI KAPPA PHI

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- Pass out the GreekLifeEdu Associate Member Instructions handout to associate members.

**What questions do you have about the obligations of membership in our chapter?**

- If the Standards Board Chairman has been facilitating, they should turn it back to the main facilitator (typically the Warden or another member of the New Member Education Committee) here.

## Pi Kappa Phi's Rules & Policies - 15 minutes

- If you have asked the Risk Manager to be a guest facilitator, allow them to take over here. Be sure to remind them to introduce themselves, if necessary.

**In addition to our chapter's obligations of membership, there are a number of rules and policies that all members of Pi Kappa Phi are governed by.**

The rules that govern our Fraternity are Pi Kappa Phi's Constitution & Supreme Laws, collected and published after each Supreme Chapter in *The Gold Book*. While some content is esoteric (secret), an exoteric (not secret) version of *The Gold Book* is available on the Pi Kapp Resource Library.

**Each chapter of Pi Kappa Phi also creates and adopts their own constitution & bylaws, which work in tandem with the Fraternity's Constitution & Supreme Laws. Let's talk through ours.**

- Pass out your chapter's constitution & bylaws to associate members.

**In addition to the rules outlined by *The Gold Book* and our chapter's constitution & bylaws, there are a number of policies and statements of position that members should be aware of.**

**Let's start with Pi Kappa Phi's risk management policy.**

- Ask for volunteers to read aloud Pi Kappa Phi's risk management policy, which can be found in Appendix C of *The White Diamond*.
- Reinforce that all associate member events & activities are alcohol-free. This includes education sessions, quizzes, retreats, big brother activities, and anything else a reasonable observer would consider to be an associate member event or activity.
  - If it wasn't already added, add "alcohol-free associate member events & activities" to both lists of expectations.

**Next, let's walk through Pi Kappa Phi's Statements of Position.**

- Ask associate members to spend 10 minutes silently reading all six statements of position in Appendix B of *The White Diamond*. While they read, associate members take note of any sections that stand out to or surprise them.

# WEEK ONE

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- After 10 minutes, ask for volunteers to share some of the things that stood out to or surprised them.

**What questions do you have about Pi Kappa Phi's rules & policies?**

**Before we wrap up for the day, there is one more thing I want to let all of you know.**

**As an organization founded on the principles of friendship, Pi Kappa Phi expects that all members treat each other with dignity and respect.**

**The Fraternity's aim and purpose is to promote fellowship and mutual trust among its members, and we fundamentally oppose any activity that could be considered mentally, physically, or emotionally unsafe.**

**Members and associate members who are aware of behavior that is inconsistent with our shared standards should contact the National Headquarters at (804) 389-4439 and ask for the Assistant Executive Director of Prevention & Accountability.**

- If the Risk Manager has been facilitating, they should turn it back to the main facilitator (typically the Warden or another member of the New Member Education Committee) here.

## Week One Wrap-Up - 20 minutes

**We've talked about a lot today. Before we go, we are going to participate in our first weekly reflection.**

- Pass out the Phinal Thought: Week One handout.
- Ask associate members to spend 10 minutes silently completing the reflection.

**Additionally, I want to share your homework for the upcoming week.**

- Share the homework for Week One: Orientation to Pi Kappa Phi:
  - Identify three potential areas of focus for your Capstone Project and submit them to the New Member Education Committee before next week's lesson.
  - Familiarize yourself with the following terms: privilege, bias, diversity, inclusion, equality, and equity.
    - Note: associate members should rely on external references (Google, textbooks, etc...) to familiarize themselves with these terms.
  - Read Chapter Five: Accountability (pages 139-151, 2019 edition) of *The White Diamond*.
  - Claim your Pi Kappa Phi account. Instructions will be emailed to associate members after the Secretary uploads their records to Chapter Gateway.
- Pass out the Little Brother Questionnaire. Ask associate members to complete and submit it to the New Member Education Committee before next week's lesson.

# ORIENTATION TO PI KAPPA PHI

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- Pass out the Four Themes of Brotherhood handout and instruct associate members to familiarize themselves with it.
- Remind associate members to begin Part One of GreekLifeEdu.
  - Remind associate members that they must complete Part One prior to participating in the Ritual of Initiation. Share that those who complete Part One prior to Week Two: An Uncommon Brotherhood may find themselves better prepared for some of the activities.
  - Associate members can reference the GreekLifeEdu Associate Member Instructions handout to find out how to complete Part One.

**Finally, we are going to participate in our first weekly quiz.**

- Pass out the Week One: Orientation to Pi Kappa Phi quiz and ask associate members to spend the next 10 minutes completing it.
- Once associate members complete the quiz, they may be dismissed.





# WEEKLY OVERVIEW

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## OVERVIEW

During the second week of associate member education, associate members will participate in an associate member retreat. The retreat will explore the relationships they are building with one another as well as with other chapter members, define brotherhood, and engage associate members in a series of experiential activities designed to help them understand the four themes of brotherhood.

To prepare for this week's events and activities, the Warden should:

- Hold the Big Brother Orientation session with all Big Brothers prior to the Big Brother Ceremony.
- Identify the activities you will offer during Exploring Shared Social Experiences.
- Coordinate the planning of the Big Brother Ceremony with the Chaplain.
- Gather all materials and supplies needed for the subordinate ritual, education session, and activities.

With all activities considered, the New Member Education Committee can expect to spend up to ten hours planning and executing the programming for this week. Big Brothers can expect to spend up to eight hours participating in associate member activities this week. Associate members can expect to spend up to eight hours participating in associate member activities - including homework - this week.

### ASSOCIATE MEMBER RETREAT (6 hours)

- Retreat Welcome (10 minutes)
- The Themes of Brotherhood (15 minutes)
- Exploring Shared Social Experiences (70 minutes)
- Exploring Solidarity (60 minutes)
- Lunch/Break (45 minutes)
- Exploring Belonging (50 minutes)
- Exploring Accountability (90 minutes)
- Week Two Wrap-Up (20 minutes)

### BIG BROTHER ORIENTATION (30 minutes)

- Orientation Welcome (5 minutes)
- Your Role as a Big Brother (10 minutes)
- Expectations & Their Experience (10 minutes)
- Orientation Wrap-Up (5 minutes)

### BIG BROTHER CEREMONY (2 hours)

- Set-up (15 minutes)
- Performance (60 minutes)
- Debrief (30 minutes)
- Tear-Down (15 minutes)

# AN UNCOMMON BROTHERHOOD

## EXAMPLE SCHEDULE

The schedule below represents an example of what Week Two: An Uncommon Brotherhood may look like when facilitated by a chapter. Note that the dates, times, and locations of subordinate rituals, education sessions, and quizzes for each week may be determined by the chapter, but all activities should start and end at a reasonable time.

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
MODEL PROGRAM	Associate Member Retreat  Quiz #2  Big Brother			Capstone Project Team Meeting			
CHAPTER ACTIVITIES	Chapter Meeting			Brotherhood Event			

# WEEKLY OVERVIEW

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## CAPSTONE PROJECT CHECK-IN

Serving as the culmination of the associate member education process, the Capstone Project asks each associate member to analyze the leadership style of a significant figure within Pi Kappa Phi and describe how that figure impacted Pi Kappa Phi, then identify an area of personal interest or passion and describe how they will practice leadership and make an impact in that area.

Each week, this section will offer tips to the New Member Education Committee to ensure that associate members remain on-track with their Capstone Project.

### **This Week: An Uncommon Brotherhood**

Unless your chapter chooses to require associate members to complete the Capstone Project individually (see pre-authorized modifications), associate members will complete the Capstone Project in teams.

During Week Two: An Uncommon Brotherhood, the New Member Education Committee should collect the areas of focus identified by associate members and create teams based on those areas of focus. For example, if three associate members identify environmental sustainability as an area of focus, they should become a team.

The New Member Education Committee should announce the teams for the Capstone Project as soon as possible after the retreat. Teams should hold an initial meeting prior to Week Three: Our Founders' Legacy to determine how exactly they want to practice leadership in their area of interest. Using the example above, the team may choose to focus on encouraging environmental sustainability within the chapter by setting up recycling bins and teaching members how to recycle.

### **Next Week: Our Founders' Legacy**

After participating in the activities for Week Three: Our Founders' Legacy, Capstone Project teams will be prepared to identify a significant figure in Pi Kappa Phi's history and describe how that person impacted the Fraternity.



# AN UNCOMMON BROTHERHOOD

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## UTILIZING GUEST FACILITATORS

Throughout the Model Associate Member Education Program, you may invite guests to facilitate specific discussions or activities. Guest facilitators are great resources and, in some cases, they may even be leveraged as subject matter experts (e.g. the Risk Manager discussing Pi Kappa Phi's risk management policy).

During Week Two: An Uncommon Brotherhood, you may consider inviting the following guests to facilitate sections of the curriculum:

- Chaplain: The Themes of Brotherhood, Exploring Belonging
- Risk Management Chairman: rounds one (“Before the Event”) and two (“During the Event”) of the Prevention in Action activity
- Standards Board Chairman: round three (“After the Event”) of Prevention in Action activity

When using guest facilitators, be sure to walk them through the facilitator's guide in advance of the meeting, reviewing any talking points or activities that they should facilitate. Additionally, remind guest facilitators to respect the integrity of the curriculum. Those who do not should not be asked to facilitate again in the future.

## PRE-AUTHORIZED MODIFICATIONS

While the Model Associate Member Education Program is a shared associate member education experience, each chapter may need to make changes to the program based on the needs of their members. The modifications below have been authorized by the National Headquarters for use by any chapter.

Choose from as many of the modifications below as you would like. If you select any of the modifications, be sure to include their selection as part of your program date submission on Chapter Gateway.

- Invite all initiated members to participate in Exploring Shared Social Experiences. If invited, initiated members should leave when the associate members move on to Exploring Solidarity.
- Move the Big Brother Ceremony to the third week of associate member education and hold a different subordinate ritual during week two. The replacement must be found in the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*.
- Direct associate members to the digital version of handouts instead of printing them.
- Require associate members to complete the Capstone Project individually instead of in teams.
- Offer a weekly take-home quiz instead of one taken in the education session.

**Note that, unless previously approved in writing on or before August 1, 2019 by the National Headquarters, your chapter may not make modifications to the Model Associate Member Education Program other than those listed above.**

# WEEK TWO

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## ASSOCIATE MEMBER RETREAT (6 hours)

### Session Outcomes

As a result of participating in this retreat, associate members should be able to:

- Deepen relationships with other chapter members.
- Define the four themes of brotherhood: shared social experiences, solidarity, belonging, and accountability.
- Describe the key characteristics of inclusive leadership.
- Communicate the mental health resources offered to members of Pi Kappa Phi.
- Compare and contrast the roles of Ultimate Respect and the Standards Board in promoting a culture of accountability within the chapter.
- Hold all members accountable to Pi Kappa Phi's rules and policies.

### Preparing for the Retreat

#### Setup Instructions

- If your chapter offers outdoor activities during Exploring Shared Social Experiences, be sure to have outdoor space reserved as necessary. Additionally, be sure to provide plenty of water to all members in attendance and take note of any forecasts of severe weather and any allergies that members have.
- Tables and chairs set in a large horseshoe, or U, shape
- You will need access to flip chart paper or a whiteboard. When you should record something on the flip chart paper or whiteboard, the facilitator guide will prompt you with the following cue: **FLIP CHART**.
- If possible, you will want to prepare some flip charts prior to the retreat. Prepared flip chart paper should be hidden until you are ready to reveal them. Each of the prepared flip charts should contain the following information:
  - On one sheet of flip chart paper, write the names of each of the four themes of brotherhood: shared social experiences, solidarity, belonging, and accountability.
  - On another sheet of flip chart paper, write the ground rules listed on page 38 of this facilitator guide.
  - On a third sheet of flip chart paper, write the partner walk questions listed on page 43 of this facilitator guide.
- You will need access to audio/video equipment for Behind Happy Faces: Module One. For more details, reference the Behind Happy Faces facilitator guide.

# AN UNCOMMON BROTHERHOOD

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## Supplies Needed

- Bring both expectations flip charts from Week One: Orientation to Pi Kappa Phi.
- Any materials or equipment needed for activities facilitated during Exploring Shared Social Experiences (e.g. video game consoles, board games, Frisbees).
- Painter's tape for the Cross the Line activity is not necessary but can be helpful.
- If the chapter is providing lunch for associate members during the associate member retreat, be sure to have the supplies needed to make it or the contact information for the restaurant you are ordering from.
- Facilitator guide and PowerPoint for Behind Happy Faces: Module One. These can be provided by the Chaplain or, if needed, by your Leadership Consultant.
- One index card for each associate member.
- Copies of each of the following handouts for each team during Prevention in Action:
  - Chapter written risk management procedures
  - Chapter constitution & bylaws
  - Before the Event scenario & worksheet
  - During the Event scenario & worksheet
  - After the Event scenario & worksheet
- One copy of the Prevention in Action answer key for each person helping with scoring.
- Scratch paper or a digital word processor (e.g. Microsoft Word) to keep track of points earned by each team during the Prevention in Action activity.
- Prizes for the Prevention in Action activity.
- Copies of each of the following handouts for each associate member:
  - Common Identities and Labels.
  - Identity Inventory.
  - Campus Assistance Program (abb. CAP) cards.
  - Pi Kappa Phi's crisis management plan.
  - Phinal Thought: Week Two.
  - Week Two: An Uncommon Brotherhood quiz.
- Extra pens or pencils for associate members (if they lose theirs).
- Flip chart paper and markers.

# WEEK TWO

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## Retreat Welcome - 10 minutes

- Welcome associate members to the second week of associate member education.
- If Big Brothers are in attendance for the retreat, let them introduce themselves to the associate members. They should not reveal who their Little Brother is.

We have a lot of exciting activities planned for today but before we begin, I want to refer back to the expectations you set for one another last week.

- Reveal and review the expectations that the associate members set for one another during Week One: Orientation to Pi Kappa Phi.

How well have we abided by these expectations throughout the past week?

- Reveal and review the expectations that the associate members set for the chapter during Week One: Orientation to Pi Kappa Phi.

How well have chapter members abided by these expectations throughout the past week?

Do we need to add to or change any of these expectations?

Now that we have revisited our shared expectations, we can begin thinking about our theme for the week, “An Uncommon Brotherhood.” Our goals for today are to see the differences between friendship and brotherhood, clearly define the four ways in which members of Pi Kappa Phi think about brotherhood, and deepen our relationships with one another.

What questions do you have before we begin?

## The Themes of Brotherhood - 15 minutes

Before we can have a conversation about what makes Pi Kappa Phi’s brotherhood so uncommon amongst our fraternal peers, we have to agree on a definition of what brotherhood is.

- Instruct associate members to spend five minutes recording their personal definition of brotherhood in their notebook, laptop, or phone. Tell them that they will be asked to share their definition, so it is important that they write it down.
- After five minutes, ask for associate members to share their responses. FLIP CHART or record their responses where all participants can see them.

As you can see, each of us describe or define brotherhood differently. This is true not only within our chapter but nationwide.

The Fraternity has partnered with Dyad Strategies, an educational assessment company that works with universities and fraternal organizations across the nation, to measure the impact of the Pi Kappa Phi experience on our members in order to elevate the quality of the student experience.

# AN UNCOMMON BROTHERHOOD

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Through this partnership, four themes of brotherhood are annually measured. To become the ideal chapter, it is critical to fully understand how each of these four themes impact our brotherhood.

- Reveal the prepared FLIP CHART that states each of the themes of brotherhood:
  - Shared Social Experiences
  - Solidarity
  - Belonging
  - Accountability

One of the homework assignments I asked you to complete over the past week was to review these four themes and reflect on the ways they play out in our chapters. While we will spend the majority of our day exploring each of these themes in great detail, I want to make sure we are all on the same page before we begin.

- Ask associate members to share their definition for each of the four common themes of brotherhood as well as an example of how they may play out in the chapter. FLIP CHART examples.
- If associate members struggle to define the themes or identify examples of them, consider sharing the following:
  - Shared social experiences: the desire to have fun things to do and people to do those fun things with. This type of brotherhood is best described as surface-level. Examples of shared social experiences may include brotherhood or social events.
  - Solidarity: giving and receiving brotherhood through demonstrations of support and conformity. It is best represented by the thought, “brothers have each other’s backs.” Examples of solidarity may include voting for a brother who is running for president of Student Government Association, or members attending a play that one brother is performing in.
  - Belonging: a sense of connection beyond friendship. Chapter members who experience high feelings of belonging value the relationships they have built with others and feel valued by their chapter brothers. Examples of belonging may include brothers describing others as “their best friends” or brothers wanting to truly get to know other brothers beyond the surface level.
  - Accountability: the idea that brotherhood is best demonstrated when members hold one another to higher standards, thus making them better men and leaders. Examples of accountability may include brothers regularly giving and receiving Ultimate Respect or brothers choosing to refer others to the Standards Board when Ultimate Respect fails.

If we return to our activity from a few minutes ago, which themes of brotherhood are most prevalent in each of our definitions of brotherhood?

- FLIP CHART the themes that are most closely related to each definition recorded on the flip chart paper. Multiple themes may be apparent in each definition. For example, the definition “brotherhood is about supporting one another and helping each other

# WEEK TWO

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become the best versions of themselves” may be linked to the themes of solidarity (supporting one another) and accountability (becoming the best versions of themselves).

**How are shared social experiences and solidarity different than belonging and accountability?**

- One key difference is that when shared social experiences and solidarity get too high, problems can begin to form in a chapter’s brotherhood. In contrast, higher levels of belonging and accountability can contribute to a positive, healthy brotherhood.

**As we move into the remainder of the day, I hope to help each of you not only understand but gain first-hand experience with each of the themes of brotherhood.**

**What questions do you have about the four themes of brotherhood before we move on?**

- If you have had problems getting associate members to answer questions, encourage them to speak up. Remind them that it’s likely that they are not the only one who is confused, so they should speak up to help others process.

## Exploring Shared Social Experiences - 70 minutes

- During this section of the retreat, the chapter should organize some activities for associate members to participate in. Examples of some activities include video games, board games, Frisbee, or kickball.
  - If your chapter has an associate member class of ten or less, consider offering one to two activities to choose from.
  - If your chapter has an associate member class of eleven to twenty-four, consider offering three or four activities to choose from.
  - If your chapter has an associate member class of twenty-five or larger, consider offering five or six activities to choose from.
- Be sure to offer a variety of activities during this time, keeping in mind the preferences of associate members. The primary goal of these activities is to offer a space for associate members to relax and become more comfortable with one another before diving into some of the more challenging conversations during the retreat.

**Let’s kick off our exploration of the four themes of brotherhood with the theme described as surface-level, shared social experiences. For the next hour, we have a few activities available for you to participate in. You are welcome to choose as few or as many of these activities as you would like. Keep in mind, however, that you must choose at least one activity to participate in.**

- Be sure to share any safety announcements, including the location of water during the Exploring Shared Social Experiences activities.
- After an hour, bring associate members together for a quick debrief.

# AN UNCOMMON BROTHERHOOD

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If our chapter only offered activities like those you just participated in, what would you think of your membership experience?

How do these activities help you grow as a leader and as a man?

How do these activities help our chapter become more like the ideal chapter?

While a balanced menu of shared social experiences may reduce stress and increase a member's satisfaction, these activities rarely allow members the opportunity to deepen their relationships with one another. If brothers focus too much on this theme, the brotherhood may begin to feel hollow and individual brothers may begin to prioritize the "fun" of fraternity over their other responsibilities and commitments.

As with so many other things in our life, it is important to maintain balance when we consider the theme of shared social experiences.

What questions do you have about this theme?

## Exploring Solidarity - 60 minutes

The second theme of brotherhood is solidarity. Best shown by demonstrations of support and conformity, it is incredibly important to keep this theme of brotherhood balanced, just like shared social experiences.

When solidarity is too low, brothers may fail to support one another. When it is too high, brothers may only surround themselves with people who look or think like them.

Why might it be problematic to only surround yourself with people who look or think like you?

- If associate members struggle with this question, consider sharing one of the examples below.
  - Consider a football team. If a coach built an offensive line that was composed entirely of quarterbacks, what would be the strengths of that team? What weaknesses would the team have? How would the overall potential of the team be affected by this decision?
  - Consider a party in a roleplaying game. If the party consisted entirely of tanks, what strengths would the party have? What weaknesses would the party have? How might the lack of a healer or damage-dealer affect the potential of the party?
- If they aren't mentioned, be sure to share the potential challenges listed below:
  - Creating an "us" versus "them" mentality.
  - Worldview remains narrow, unchallenged.
  - Growth as a leader or man stunted.
  - Not realizing the full consequences of your decisions.

# WEEK TWO

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If you want to avoid these challenges and meet your full potential as a leader, you should surround yourself with people who are different than you. You took the first step by joining a brotherhood of nearly 145,000 men.

To take the next steps in your journey, I am going to ask each of you to engage in a conversation about inclusive leadership for the next hour. There is a lot of depth and nuance to this conversation and I want to acknowledge that we won't be able to fully explore it during the time that we have. We will, however, be able to make sure you have some basic knowledge and skills needed to successfully navigate this important topic.

Because this can be a challenging or unfamiliar conversation for some, I want to begin by identifying a few ground rules.

- Reveal the prepared **FLIP CHART** that states the ground rules listed below. If associate members want to add any other ground rules, you may add them to the list.
  - Ask questions
  - What is shared stays, what is learned leaves
  - Laugh and have fun
  - Respect differences of opinion and each other's thoughts/beliefs/etc...
  - Challenge by Choice - only share when and what you feel safe to do so
- As you review each of the ground rules listed above, ask associate members what they think that rule means. Additional information about each rule is listed below for your reference:
  - Ask questions: this conversation is an opportunity to learn new things. If you are confused, need clarification, or are unfamiliar with something, don't hesitate to ask. If you have a question, it is likely that someone else in the room has that same question.
  - What is shared stays, what is learned leaves: the conversations that you have are expected to remain private. If someone shares a detail about themselves that associate members want to learn more about, encourage associate members to have a one-on-one conversation with that member. Remind associate members that they should not share personal information learned during this conversation with those outside of the room.
  - Laugh and have fun: above all else, associate member education should still be fun and educational. While the session may be leading associate members into unfamiliar territory, they should still be themselves.
  - Respect differences of opinions and each other's thoughts/beliefs: during this conversation associate members may realize that others have a difference of opinion with them. While this may be surprising, they should listen to their fellow associate members and give them the benefit of the doubt.
  - Challenge by choice: encourage associate members to step outside of their comfort zone for the sake of this conversation, but not to overreach. If they need to take a break at any point to collect their thoughts, encourage them to do so.
- After all ground rules are listed, ask associate members to acknowledge that they can follow these rules.



# AN UNCOMMON BROTHERHOOD

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If we are going to have this conversation about inclusive leadership, we should review a few terms. Over the past week, one of your homework assignments was to familiarize yourself with the following terms: privilege, bias, diversity, inclusion, equality, and equity.

- Ask associate members to define each of those terms in their own words.
- Acknowledge that, similar to when you asked associate members to define brotherhood, they may have different answers. For the sake of today's conversation, you will use a common set of definitions.
- Pass out the Inclusive Leadership Key Terms & Definitions handout.
- Clarify any questions that associate members have about the definitions that you will use during the remainder of the conversation.

**Is anyone particularly familiar with any of these terms? If so, where have you encountered them before?**

**Are there any terms that you want to learn more about today?**

As we move forward with our conversation about inclusive leadership, we need to think about identities. Each person has multiple identities, some more dominant or visible than others. Whenever two people interact, their biases and prejudices about the other person's identities are present, whether they know it or not. Let's take a few minutes to explore the idea of identities.

- Pass out the Common Identities and Labels handout.

The way we think about an identity, whether positive or negative, is called a bias. There are many different kinds of biases but one that I want us to consider is the similar-to-me bias.

As you might guess from the name, similar-to-me bias leads people to think more favorably of people who are like them. It might surprise you to realize how prevalent this bias is.

**Where do you think similar-to-me bias might appear?**

- If associate members struggle to answer, consider sharing the examples below:
  - A manager hiring or promoting an employee that looks like them or went to the same college as they did.
  - Joining a fraternity because members are from your hometown, because they play the same sports, or because it "feels comfortable."

If you aren't careful, similar-to-me bias can run rampant in your life. You can find yourself completely surrounded by people who only look or think like you. Does that sound familiar? It should. When we talked about the effects of high levels of solidarity earlier, we were actually talking about the similar-to-me bias.

In the spirit of self-discovery, let's take a few minutes to think about the identities of ourselves and those closest to us.

# WEEK TWO

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- Pass out the Identity Inventory handout and instruct associate members to spend the next 10 minutes completing it. If they have questions about labels for specific identities, encourage them to refer to the Common Identities and Labels handout.
- After 10 minutes, debrief the inventory with the questions below.

**Was there anything that surprised you as you completed the inventory?**

**To what extent do you find yourself affected by the similar-to-me bias?**

**If you want to minimize or eliminate similar-to-me bias in your life, you can start by building relationships with people who are different than you. I would encourage you to start with the men in this room. From there, you can branch out to other members of the chapter, your classmates, professors, others on campus, or leaders in the local community.**

**To better get to know the men in the room, I want to ask everyone to participate in an activity.**

- If Big Brothers are in attendance, ask them to participate in the following activity.

**I am going to read a series of statements that will apply to or explain specific categories, labels, preferences, descriptions, etc., and ask that you cross the line if the statement applies to you.**

**For example, I might say “Cross the line if you prefer wearing jeans as opposed to shorts.” If this statement applies to you and you feel comfortable acknowledging it, you should walk to the other side of the line.**

- Demonstrate what you mean by actually stepping across the line.

**Once you have crossed the line, I will ask that you turn, pause, and face the members behind you who did not cross the line. After I say, “thank you,” those who crossed the line should return to the starting side. The process will then continue with another statement.**

**As we enter this activity, please keep in mind the ground rules we set. If there are no questions, we will begin.**

- Cross the line if you enjoy reading.
- Cross the line if you enjoy playing sports.
- Cross the line if you enjoy writing.
- Cross the line if you achieved a 3.25 GPA or higher last semester.
- Cross the line if you have spent time in the last month volunteering.
- Cross the line if you have a fear of heights.
- Cross the line if you prefer to have a few close friends rather than many friends.
- Cross the line if you are working to help pay for your education.
- Cross the line if you or a family member are in debt or financially challenged.

# AN UNCOMMON BROTHERHOOD

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- Cross the line if you have at least one sibling.
- Cross the line if you aspire to be a role model in your family.
- Cross the line if you have a strong connection with your family.
- Cross the line if you feel disconnected from your family.
- Cross the line if you have consumed alcohol in the last month.
- Cross the line if you have been intoxicated in the last month.
- Cross the line if you do not consume alcohol.
- Cross the line if you consider yourself a religious person.
- Cross the line if you are atheist or agnostic.
- Cross the line if you have a close friend or family member who identifies as gay, lesbian, bisexual, or transgender.
- Cross the line if you consider yourself a person of color.
- Cross the line if you know little about your cultural heritage.
- Cross the line if someone has incorrectly labelled one of your identities.
- Cross the line if you know someone who has been treated differently because of one of their identities.
- Cross the line if you have participated in a racial, sexual, or other derogatory joke within the past month.
- Cross the line if you know someone who has pressured another person into having sex.
- Cross the line if you know someone who has been sexually assaulted.
- Cross the line if you have a disability.
- Cross the line if you struggle with body image.
- Cross the line if you have held another member accountable at the risk of losing your friendship or status in the chapter.
- Cross the line if you should have crossed the line for one of the previous statements but chose not to.
- Cross the line if you waited to see if others crossed the line before deciding to cross.

Thank you all for your participation. You may be seated.

What did it feel like to so visibly share these parts of who you are?

Would you say the items you crossed the line for fully describe your character or who you are?

What did this activity teach you about the first impressions you've formed about others?

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What is a lesson from this activity that you can apply to your daily life?

In our conversation about inclusive leadership, we have spent time building a shared vocabulary, discovering more about ourselves, and learning more about the other men in the room. With this shared understanding, we are ready to talk about the key characteristics of inclusive leadership.

What do you think inclusive leadership is?

- Be sure to touch on the key characteristics of inclusive leadership listed below if associate members do not bring them up.
  - Inclusive leaders are aware of their own biases and worldview.
  - Inclusive leaders seek out perspectives other than their own so that they can make better or more well-informed decisions.
  - Inclusive leaders understand that inclusive teams can achieve more than homogenous teams.
  - Inclusive leaders use their power to create more equitable systems and organizations.

Pi Kappa Phi's definition of leadership states that "Leaders exhibit self-awareness, exemplify character in thought and action, develop and foster collaborative relationships, and strive to create social change - to build a better world for themselves and others."

How might Pi Kappa Phi's definition of leadership compare to the key characteristics of inclusive leadership?

- Inclusive leadership requires leaders to be aware of their own biases, prejudices, and privileges.
- Inclusive leadership requires leaders to build and maintain positive and meaningful relationships with others.
- Inclusive leadership requires leaders to build more equitable systems and organizations for all.
  - Note that equity and equality are two separate terms. When thinking about the difference between these two terms, consider the examples below:
    - Example of equality: imagine three people who were recently injured. One has a small cut, another has a broken arm, and the third has a concussion. When treated equally, all would receive the same treatment, in this case a Band-Aid.
    - Example of equity: imagine three people who were recently injured. One has a small cut, another has a broken arm, and the third has a concussion. When treated with equity in mind, each person would receive the treatment they needed to address their symptoms.

How can our chapter practice inclusive leadership?

- If associate members struggle to answer, consider sharing the examples below:

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- Recruit members who are different than the members in the chapter.
- Partner with organizations outside of the Interfraternal Council or Panhellenic Council.
- Support The Ability Experience.

By practicing inclusive leadership, we will be able to effectively manage the levels of solidarity in our chapter and, hopefully, mitigate solidarity's more negative impacts on our brotherhood.

Before we take a break, I want you to have some time to process and debrief our conversation with another member.

- Instruct associate members to find another member in the room to partner with. If possible, have associate members partner with the member who will become their Big Brother.
- Once each associate member has found a partner, share that they will go on a walk over the course of the next 20 minutes. During this time, they must leave the room.
- Reveal the prepared **FLIP CHART** that states the questions they should discuss during their walk. Encourage each group to take a picture of the questions to reference during their walk.
  - What was something new I learned during our exploration of solidarity?
  - What was something that challenged me during our exploration of solidarity?
  - What was something I want to learn more about after our exploration of solidarity?
  - How can I practice inclusive leadership in my daily life?
- Let associate members know when and where to meet for lunch, if applicable, and share any other safety or logistics announcements (based on your retreat location).

## Lunch / Break - 45 minutes

- During the lunch or break, the New Member Education Committee should follow up with individual associate members to process the morning as necessary.
- During the lunch or break, the New Member Education Committee can clean up the room, set up audio/video equipment for Behind Happy Faces: Module One, and stage handouts for the remainder of the retreat.

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## Exploring Belonging - 50 minutes

Welcome back, gentlemen. We spent the earlier part of our day exploring the first two themes of brotherhood: shared social experiences and solidarity. For the rest of the day, we will explore the other two themes of brotherhood: belonging and accountability.

Unlike the previous two themes, which were important to keep in balance, we should increase belonging and accountability as much as possible if we want to become an ideal chapter. Said another way, you can't have "too much" belonging or accountability in a chapter.

Let's continue our retreat by exploring the third theme of brotherhood. Belonging is the theme that separates friendship from brotherhood. This theme of brotherhood is all about the relationships we build with others.

Why might it be important to build positive, meaningful relationships with other chapter members?

- If associate members struggle to answer, consider sharing the examples below:
  - To be a successful leader, you must build collaborative relationships.
  - You always need people to challenge and support you.

How can we increase belonging in our chapter?

- If associate members struggle to answer, consider sharing the examples below:
  - Take interest in other members.
  - Get to know others beyond the surface-level.
  - Be authentic.

Authenticity is described in the preface of *The White Diamond* as one of the core responsibilities of membership. When you are authentic, you show others your true self.

If we want to embrace our potential as leaders and as men, we must be willing to be authentic and vulnerable with others. It might be scary or uncomfortable to have these conversations but look around. You are surrounded by men who have committed to challenge and support you. To be there for you. To guide you. To help.

To that end, I would like us to practice being authentic and vulnerable by participating in a workshop created by Ross Szabo, Theta Eta (American). Ross is a mental health speaker that created Behind Happy Faces. There are five total modules that explore mental health and mental illness. Today, we're going to participate in Module One, which will help us understand some basic information about mental health and mental illness.

Are there any questions before we begin?

- Facilitate Behind Happy Faces: Module One. Your Chaplain should have access to the facilitator guide and should be the facilitator for this workshop. You will need access to audio/video equipment and one notecard for each associate member.

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- If possible, ask Big Brothers to participate in Behind Happy Faces: Module One.
- Behind Happy Faces: Module One should last no longer than 30 minutes.
- After Behind Happy Faces: Module One, bring associate members back together to share the following resources.

I appreciate everyone's willingness to share and be vulnerable. Before we take a short break, I want to be sure everyone is aware of a few mental health resources that Pi Kappa Phi offers.

The other four modules of Behind Happy Faces can be facilitated upon request by a chapter member, advisor, or Leadership Consultant and include topics such as: identifying mental health challenges, describing effective coping strategies, understanding how best to support or intervene someone facing mental health challenges, and identifying the warning signs of severe mental health breakdowns.

The second mental health resource offered by Pi Kappa Phi is called the Campus Assistance Program, or CAP.

- If your chapter has additional CAP cards, pass them out to associate members. They are not necessary but can be helpful resources.

This program offers members of Pi Kappa Phi access to 13,000 behavioral health counselors across the country. This free resource provides members 24-hour-a-day access to behavioral health counseling via online and telephone sessions wherever and whenever needed - near campus during the semester, at home during breaks, and almost everywhere in between.

The number for the Fraternity's free counseling services is (866) 227-3834. Any member can call the number to receive support about either issues with which he is personally struggling or to receive advice about how best to offer support his friends. It's also important to note that, while you will need to share that you're a member of Pi Kappa Phi, you will otherwise remain anonymous.

If you don't feel comfortable calling, you may also access the Campus Assistance Program online.

- **FLIP CHART** the information for associate members to access the Campus Assistance Program:
  - By Phone: (866) 227-3834
  - By Website: [www.caplifelhmsanet.com](http://www.caplifelhmsanet.com)
    - Username: pikappaphi
    - Password: myresource
- If you do not have CAP cards to pass out to associate members, encourage them to take a photo of the instructions written on the flip chart.
- If applicable, share any mental health resources offered by your campus or local community.

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- Ask if there are any questions about the mental health resources provided by Pi Kappa Phi.
- If associate members are particularly affected by Behind Happy Faces, offer a short break. During the break, the New Member Education Committee should follow up with individual associate members as necessary to process the activity, as necessary.

## Exploring Accountability - 90 minutes

The final theme of brotherhood is accountability. This theme is also one of Pi Kappa Phi's seven public values.

Can anyone help name the other values of Pi Kappa Phi?

- Congratulate anyone who is able to name the other values of Pi Kappa Phi and share that you will be spending more time talking about each of these next week.
- If associate members struggle to answer, the other six values of Pi Kappa Phi are listed below for your reference:
  - Common Loyalty
  - Personal Responsibility
  - Achievement
  - Campus Involvement
  - Responsible Citizenship
  - Lifelong Commitment

How does *The White Diamond* define accountability?

- Accountability is defined as “The duty to uphold and abide by the Fraternity’s standards of conduct and to use Ultimate Respect when confronting brothers who fail in their obligations to Pi Kappa Phi.”

Last week, we talked about the obligations of membership as well as Pi Kappa Phi's Constitution & Supreme Laws, risk management policy, and statements of position.

Based on those obligations, rules, policies, and statements, what are some examples of behavior that would require us to practice accountability?

- **FLIP CHART** responses and the examples below (if they are not covered by associate members). You will want to leave some room on the flipchart so that you can come back in a few minutes and complete the categorization activity described on the next page.
  - Failing to meet the chapter's attendance requirement.
  - Failing to remain current on dues without an established payment plan.
  - Failing to meet Pi Kappa Phi's minimum expectation for academic performance.
  - Causing damage to the chapter facility, if applicable.



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- Fighting members or guests.
- Bringing a handle of liquor to a chapter event.
- Offering Adderall or other controlled substances to other chapter members.
- Engaging in sexist or sexually abusive behavior, whether physical, mental, or emotional.

## Why is it important that we practice accountability within our chapter?

- Associate members may share that members should be punished if they do not abide by Pi Kappa Phi's rules. Remind them that the desired outcome is for the member to reflect on, learn from, and move past their problematic behavior. The primary goal of accountability is to help others become better leaders and better men, not to punish.

## We have identified when we should use accountability and described its importance, but how do we actually practice it?

- Pi Kappa Phi has two primary ways that members can practice accountability:
  - Ultimate Respect
  - The Standards Board

**Ultimate Respect is when you put the well-being of the Fraternity or an individual brother ahead of the friendship and realize that the unpleasantness of short-term conflict is better than the long-term ramifications of inaction.**

- Refer associate members to page 149 of the 2019 edition of *The White Diamond* for Ultimate Respect guidelines.

**The Standards Board, on the other hand, adjudicates alleged violations of Pi Kappa Phi's standards of conduct. Any member may refer a case to the Standards Board by filing a complaint with the Standards Board Chairman and Archon. It should be used whenever a member exhibits consistent or severely problematic behavior, or when Ultimate Respect has failed.**

- Be sure to share who is on your chapter's Standards Board. Per Supreme Law, it must consist of at least five members. Additionally, you may choose to share how the Standards Board is chosen; are the members elected by the chapter, or appointed by the Executive Council and ratified by the chapter?
- If the Standards Board Chairman is in attendance, be sure to have him introduce himself if he hasn't already.

**With this in mind, let's return to our examples and see if we can't figure out what accountability method would be most appropriate.**

- For each of the examples of problematic behavior identified by associate members or listed above, ask associate members to share whether or not they think the brother should be confronted with Ultimate Respect or referred to the Standards Board.
- **FLIP CHART** the responses of associate members next to the examples.

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We need to acknowledge that, as a result of problematic behavior, a crisis could occur. While it is unlikely, it is still important that every member knows what to do when a crisis occurs.

- Pass out Pi Kappa Phi's crisis management plan.
- Ask for volunteers to read each section of the crisis management plan.
- Clarify any questions that associate members have about the crisis management plan.

Additionally, the National Headquarters can be an important partner when it comes to addressing problematic behavior within the chapter, specifically when the behavior of one or more members becomes extreme.

Looking at the list of behaviors we made a few minutes ago, for which of the behaviors should our chapter notify the National Headquarters?

- The examples below may warrant intervention from the National Headquarters based on their severity.
  - Causing damage to the chapter facility (case-by-case).
  - Fighting members or guests.
  - Offering Adderall or other controlled substances to other chapter members.
  - Engaging in sexist or sexually abusive behavior, whether physical, mental, or emotional.
    - If a chapter member receives notice of an allegation of sexual misconduct, the chapter member should immediately notify the Archon. The Archon then needs to make a report without any delay to Brooke Kingsley Isbell (804-389-4439 or bisbell@pikapp.org) or Emily Feinstein (980-504-0888 or efeinstein@pikapp.org) via phone or email summarizing what was reported.

Pi Kappa Phi believes that any member should be empowered to hold any other member accountable to Pi Kappa Phi's shared standards, regardless of age, position, or initiation status. It's a cornerstone of the fraternity experience. If members feel that they should not or cannot hold a member accountable, or actively choose not to, we have failed as a chapter.

What questions do you have about accountability?

For the remainder of our retreat, you are going to participate in a case study. This case study will take us through the "before, during, and after" of event planning and will help you apply Pi Kappa Phi's risk management policy and accountability strategies to a real-world scenario.

In an effort to improve risk management and accountability practices, the chapter has created a "Chapter Safety & Accountability Committee." The committee has been given two objectives: help the chapter host safe & successful social events, and hold accountable any members who fail in their obligations to the chapter. The actions and recommendations of the committee are supported and upheld fully by the Executive Council.

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- **FLIP CHART** the objectives and post them in a visible area:
  - Help the chapter host safe & successful social events.
  - Hold accountable any members who fail in their obligations to the chapter.

You have recently been appointed to the Chapter Safety & Accountability Committee along with a few other members of the chapter. To be a successful member of the committee, you will want to be familiar with Pi Kappa Phi's risk management policy, Constitution & Supreme Laws, and statements of position. You may also find benefit in being familiar with our chapter's written risk management procedures and constitution & bylaws.

- Share that Pi Kappa Phi's risk management policy, Constitution & Supreme Laws, and statements of position can be found on the Pi Kapp Resource Library.
- Pass out your chapter's written risk management procedures and constitution & bylaws.
- Share that associate members may use any other resources at their disposal to be successful. They may ask for help from initiated members, but initiated members may not join the committee. They may only help by providing facts or advice if asked.

For the sake of this activity, you will be split into teams and work together in your teams to meet the objectives identified earlier on the flip chart. Your team will be awarded points for actions or recommendations that move the Chapter Safety & Accountability Committee closer to either objective.

Finally, prizes will be awarded to the team with the highest points at the end of each part - before, during, and after the event - as well as to the team with the highest point total at the end of the activity.

- Acknowledge that, while some responses may be more effective than others, each correct answer will only receive one point.
- Reveal the prizes for each part of the activity as well as the overall prize for the teams that earn the highest score.

**Are there any questions before we begin?**

- Split associate members into teams of three to five.
  - If your chapter has an associate member class of 10 or less, consider splitting them into two groups of roughly equal size.
  - If your chapter has an associate member class of 25 or larger, consider breaking associate members into groups of five to seven.
- Ask each team to spend one minute coming up with their team name. Team names should remain appropriate and avoid asserting superiority over other teams.
- After one minute, pass out the "Before the Event" worksheet. Give associate members 15 minutes to complete the worksheet in their teams.
- After 15 minutes, collect and grade the "Before the Event" worksheet from each team. While the worksheets are being graded, review correct answers with associate members. Do not move on to the next part of the activity until the answers of all teams are scored,

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those scores are announced, and a prize has been distributed to the team with the highest “Before the Event” score.

- Ask other members to help score, if possible, to help the activity continue to run smoothly. Refer to the Prevention in Action Answer Key for correct answers.
- Keeping associate members in the same teams, pass out the “During the Event” worksheet. Give associate members 15 minutes to complete the worksheet in their teams.
- After 15 minutes, collect and grade the “During the Event” worksheet from each team. While the worksheets are being graded, review correct answers with associate members. Do not move on to the next part of the case study until the answers of all teams are scored, those scores are announced, and a prize has been distributed to the team with the highest “During the Event” score.
- Keeping associate members in the same teams, pass out the “After the Event” worksheet. Give associate members 15 minutes to complete the worksheet in their teams.
- After 15 minutes, collect and grade the “After the Event” worksheet from each team. While the worksheets are being graded, review correct answers with associate members. Be sure to announce the scores of each team and distribute a prize to the team with the highest “After the Event” score.
- After the results of the round are announced, calculate the total scores for each team, announce the overall winner, and distribute their prize before moving on to the debrief.

**Let’s take a step out of the activity now and discuss what just happened.**

**How well did your team do at promoting safety and accountability within the chapter?**

**For those teams that were successful, what contributed to your success?**

**How did your teams approach each part of the case study?**

**For those teams that were not as successful as they hoped, what would you do differently if you got to redo the case study?**

**When disagreement or conflict arose in your teams, how did you address it?**

**How many of you thought to use the initiated members in the room as resources? What effect did their assistance have on your group’s results?**

**What did this exercise teach you about Pi Kappa Phi’s risk management policy?**

**What did this exercise teach you about accountability?**

**What did this exercise teach you about brotherhood?**

**Before we end the retreat, I want to share a few words.**

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- Share any words of affirmation that you have for the associate member class. Examples may include how quickly or effectively they are building relationships with one another or with the chapter, performing well on the first weekly quiz, or upholding the expectations they set for one another. Regardless of what you share, be sure it is honest.

At this point of the associate member education process, I hope you feel as though you can trust and confide in the men in this room. I also hope you feel satisfied with your decision to join Pi Kappa Phi and feel the bonds of brotherhood growing all around you.

For the next four weeks, you will learn about Pi Kappa Phi - our history, our values, our governance, our core concepts - in a way that you have not yet explored. There is a lot to learn in a relatively short period of time. To help you through this process, we will pair each of you with a guide. We will do this by asking each of you to participate in a special ceremony.

After the ceremony, there will be a short debrief. The ceremony debrief will conclude the associate member retreat. Before we begin the ceremony, however, I want to wrap up this week's lesson.

## Week Two Wrap-Up - 20 minutes

- Remind associate members that what they learned today should leave the room, but things shared by other members should stay. If they feel as though they want to talk more with an individual member, they should schedule time in the next week to talk. Encourage associate members to use Ultimate Respect if they feel as though they need to share feedback with an individual member.

We've talked about a lot today. Before we go, though, we are going to participate in our weekly reflection.

- Pass out the Phinal Thought: Week Two handout.
- Ask associate members to spend 10 minutes silently completing the reflection.

Additionally, I want to share your homework for the upcoming week.

- Share the homework for Week Two: An Uncommon Brotherhood:
  - Meet with your Capstone Project team and determine how exactly your team will practice leadership in your area of focus.
  - Read Chapter One: Our Proud History (pages 16-41, 2019 edition) of *The White Diamond*. Pi Kappa Phi history videos are also available on YouTube if associate members want to learn more about our history.
  - Familiarize yourself with your chapter's history, if applicable.
  - Memorize The Student Creed.
  - Familiarize yourself with Pi Kappa Phi's values (page 89 of *The White Diamond*).

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Finally, we are going to participate in our second quiz.

- Pass out the Week Two: An Uncommon Brotherhood quiz and ask associate members to spend the next 10 minutes completing it.
- As associate members complete the quiz, send them to the Chaplain to begin the Big Brother Ceremony.

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## **BIG BROTHER ORIENTATION (30 minutes)**

### **Session Outcomes**

As a result of participating in this education session, Big Brothers should be able to:

- Build positive, meaningful, and healthy relationships with their Little Brothers.
- Describe the responsibilities of a Big Brother.
- Brainstorm Big Brother/Little Brother activities that align with Pi Kappa Phi's risk management policy.

### **Preparing for the Session**

#### **Setup Instructions**

- Tables and chairs set in a large horseshoe, or U, shape
- You will need access to flip chart paper or a whiteboard. When you should record something on the flip chart paper or whiteboard, the facilitator guide will prompt you with the following cue: **FLIP CHART**.

#### **Supplies Needed**

- Big Brother/Little Brother pairings.
- Extra pens or pencils for Big Brothers (if they lose theirs).
- Copies of each of the following handouts for each Big Brother:
  - Big Brother/Little Brother Contract.
  - Recommended Big Brother/Little Brother Activities.
- Flip chart paper and markers.

## **Welcome - 5 minutes**

- Welcome Big Brothers as they enter the room.

Gentlemen, thank you for applying to be a Big Brother. As you may already know, each of you have been selected to be a Big Brother. Our time together today will help you begin to understand your role, what is expected of you, and identify the support you will need from each other and the chapter to be successful.

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## Your Role as Big Brother - 10 minutes

Let's start our conversation today by defining your role as a Big Brother.

What is the purpose of a Big Brother?

- The purpose of a Big Brother is to provide guidance and advice, serve as a role model, and develop a positive and meaningful friendship with their Little Brother that promotes the dignity and respect of all members.
- **FLIP CHART** the words advisor, role model, and friend.

As a Big Brother, you are an advisor, role model, and friend to your Little Brother as well as to the rest of the associate member class.

Let's spend a few minutes exploring each of these roles.

- Break Big Brothers into three groups of roughly equal size.
- Pass out one sheet of flip chart paper to each group and assign each group one of the roles of a Big Brother (advisor, role model, friend).

For your assigned role (e.g. advisor), think about a person in your life who held that role for you. What traits or behaviors made them stand out from others who might have held that role? As a group, spend the next two minutes discussing and recording these traits and behaviors on your flip chart paper.

- After two minutes, ask each group to nominate a spokesperson to share what their group discussed.

How does your role relate to helping associate members prepare for lifelong membership in Pi Kappa Phi? Spend the next two minutes discussing and recording your thoughts on the flip chart paper.

- After two minutes, ask each group to nominate a spokesperson to share what their group discussed.

Next, spend three minutes brainstorming as many activities or opportunities as you can that relate to or promote your role. For example, going to a movie with your Little Brother may fulfill your role as friend.

- After three minutes, ask each group to nominate a spokesperson to share what their group discussed.

It's also important to note that while you will not be in attendance at every education session, you will be asked to participate in some of the core experiences of the associate member education process.

- **FLIP CHART** the name, date, time, and location of each of the following experiences:
  - Associate member retreat (if it hasn't already happened)



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- Big Brother Ceremony
- Friendship Visit
- Ritual of Initiation

What questions do you have about your role as a Big Brother before we move on to discussing expectations?

Now that we better understand our responsibilities as a Big Brother, let's spend some time discussing the chapter's expectations of you as well as your needs from the chapter.

## Expectations & Their Experience - 10 minutes

- Pass out one (1) copy of the Big Brother/Little Brother contract to each Big Brother.
- Ask for volunteers to read aloud each point.

What are some of the major things that stand out to you about the Big Brother/Little Brother contract?

Take a few moments to review the expectations on your contract again.

What are some of the bullet points that seem easy to live by? Why do those points stand out to you as easier?

What are some of the bullet points that seem a little more difficult to live by? Why do those points stand out to you as more difficult?

What can I, the New Member Education Committee, or the Executive Council do to help you fulfill all of the expectations listed?

- FLIP CHART responses from Big Brothers.

I will share these with the New Member Education Committee and Executive Council to make sure we are doing all we can to support you in this important role.

As we continue to review the Big Brother/Little Brother Contract, you will notice two blank areas. These will be completed during the Big Brother Ceremony Debrief, which will be held immediately following the Big Brother Ceremony. Prior to the debrief, please consider any expectations you may have for your Little Brother. They can be either general or specific, but you must both agree on them before completing the contract.

The final paragraph of the contract notes that if you fail in your obligations as a Big Brother or behave in a way which betrays the values and principles of Pi Kappa Phi, you may lose Big Brother privileges permanently.

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As the role models of the chapter, you must live above reproach. We cannot and will not tolerate behavior that violates Pi Kappa Phi's shared standards, risk management policy, or code of conduct.

Before we wrap up, let's talk about some activities you might participate in with your Little Brother to promote friendship and belonging.

What are some of the activities the two of you might be able to do together?

- If any activities violate Pi Kappa Phi's risk management policy (Appendix C of the 2019 edition of *The White Diamond*) or statements of position (Appendix B of the 2019 edition of *The White Diamond*), be sure to point out which rule it breaks and reinforce that the activity is not allowed.
- If Big Brothers are having trouble identifying activities, refer to the Recommended Big Brother/Little Brother Activities handout.
- After some activities are identified, pass out the Recommended Big Brother/Little Brother Activities handout.

Does anyone have any questions about what is expected of you or about the activities you and your Little Brother might engage in?

## Wrap-Up - 5 minutes

I appreciate your time and participation in today's Big Brother Orientation. I'm looking forward to your support through the remainder of the associate member education process and, perhaps more importantly, I'm excited to see the relationships you build with our chapter's newest members.

- Share the date, time, and location of the Big Brother Ceremony.
- Share the Big Brother/Little Brother pairings. Remind Big Brothers to keep their pairing a secret until the Big Brother Ceremony.
- Answer any final questions from the group, then dismiss.

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## BIG BROTHER CEREMONY (1 hour)

### Preparing for the Session

The setup instructions, supplies needed, and ceremony script can be found in the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*. When planning for the Big Brother Ceremony, coordinate with the Chaplain to ensure all materials are collected and a room has been secured for the event.

As with any other subordinate ritual, the Big Brother Ceremony is exoteric (not secret). Note that, before the ceremony can be conducted, all big brothers must participate in the Big Brother Orientation. The facilitator guide for the Big Brother Orientation can be found in this facilitator guide on page 53.

If your chapter does not have a copy of the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, you may order one by contacting your Leadership Consultant or Chapter Relationship Manager.

### Setup Instructions

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 42.

### Supplies Needed

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 42.
- Extra Big Brother/Little Brother Contracts (if Big Brothers lost their copy).
- Extra pens or pencils for Big Brothers and associate members (if they lose theirs).

### Set-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the set-up of the Big Brother Ceremony.
- To save time, the chapter may choose to facilitate the Big Brother Ceremony in a separate room from the education session.

### Ceremony Performance - 15 minutes

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 42.

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## Big Brother Ceremony Debrief - 15 minutes

Gentlemen, I appreciate your participation in the Big Brother Ceremony. I look forward to seeing your relationships develop and know that each of you can help the other become an ideal brother, leader, and man.

The most important part of any mentor relationship is the establishment of clear expectations. We will spend the next 10 minutes identifying those expectations of one another.

- Instruct Big Brothers to share the Big Brother/Little Brother contract with their Little Brothers. Ask volunteers to read aloud each of the expectations listed.
- After each expectation has been read, instruct participants to spend the next five minutes identifying what any other expectations for or from their Big Brother. They should partner with their Big Brother to complete this activity. Additional expectations should be recorded on the Big Brother/Little Brother Contract.

**Big Brothers, what are some of the expectations that you have set for your Little Brothers?**

**Little Brothers, what are some of the expectations that you have set for your Big Brothers?**

**How will you hold one another accountable to these expectations?**

**What are some activities that you can participate in as Big Brothers and Little Brothers?**

- Be prepared to identify, correct, and offer alternative activities if Big Brothers or Little Brothers identify activities that violate Pi Kappa Phi's standards.

**Finally, please sign and turn in your Big Brother/Little Brother contracts. I will make a copy of these and return them to you. Congratulations, gentlemen.**

- Big Brothers & Little Brothers should make any additional notes on their Big Brother/Little Brother contracts (distributed during Big Brother Orientation), sign the contract, and turn it in. Ensure all participants have given you a signed copy of their contract before ending the debrief.

## Clean-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the clean-up of the Big Brother Ceremony.



# WEEKLY OVERVIEW

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## OVERVIEW

During the third week of associate member education, associate members will learn about fraternity history, identify their personal values, define Pi Kappa Phi's values, and describe how values impact our daily lives.

To prepare for this week's events and activities, the Warden should:

- Secure members to help with scoring during History Trivia.
- Coordinate the planning of the subordinate ritual with the Chaplain.
- Gather all materials and supplies needed for the subordinate ritual, education session, and activities.

With all activities considered, the New Member Education Committee can expect to spend up to eight hours planning and executing the programming for this week. Big Brothers can expect to spend up to three hours participating in associate member activities this week. Associate members can expect to spend up to six hours participating in associate member activities - including homework - this week.

## EDUCATION SESSION (2 hours & 45 minutes)

- Week Three Welcome (10 minutes)
- History Trivia (70 minutes)
- Values of Pi Kappa Phi (15 minutes)
- Personal Values (20 minutes)
- Values into Action (30 minutes)
- Week Three Wrap-Up (20 minutes)

## ULTIMATE RESPECT (2 hours)

- Set-up (15 minutes)
- Performance (75 minutes)
- Debrief (15 minutes)
- Tear-Down (15 minutes)

# OUR FOUNDERS' LEGACY

## EXAMPLE SCHEDULE

The schedule below represents an example of what Week Three: Our Founders' Legacy may look like when facilitated by a chapter. Note that the dates, times, and locations of subordinate rituals, education sessions, and quizzes for each week may be determined by the chapter, but all activities should start and end at a reasonable time.

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
MODEL PROGRAM				Education Session Quiz #3 Ultimate Respect Sub-Ritual			Capstone Project Team Meeting
CHAPTER ACTIVITIES	Chapter Meeting			Brotherhood Event			

# WEEKLY OVERVIEW

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## CAPSTONE PROJECT CHECK-IN

Serving as the culmination of the associate member education process, the Capstone Project asks each associate member to analyze the leadership style of a significant figure within Pi Kappa Phi and describe how that figure impacted Pi Kappa Phi, then identify an area of personal interest or passion and describe how they will practice leadership and make an impact in that area.

Each week, this section will offer tips to the New Member Education Committee to ensure that associate members remain on-track with their Capstone Project.

### This Week: Our Founders' Legacy

Unless your chapter chooses to require associate members to complete the Capstone Project individually (see pre-authorized modifications for Week Two: An Uncommon Brotherhood), associate members will complete the Capstone Project in teams.

During Week Three: Our Founders' Legacy, Capstone Project teams should identify the significant figure in Pi Kappa Phi's history and describe how that person impacted the Fraternity. For your reference, some basic examples have been provided below:

- Theodore Barnwell Kelly, Alpha (College of Charleston): By granting a charter to Gamma (UC - Berkeley), Kelly challenged the other Founders to make Pi Kappa Phi a national experience. Without his leadership, Pi Kappa Phi might not have grown as quickly.
- Mel Metcalf, Alpha Gamma (Oklahoma): During his term as National President from 1964-1966, Metcalf travelled to every chapter of Pi Kappa Phi to convince members to desegregate the Fraternity. Without his persuasive personality, character, and love for Pi Kappa Phi, our organization may have been irreparably damaged.
- Durward W. Owen, Xi (Roanoke): The Fourth Honorary Founder and Executive Director Emeritus of Pi Kappa Phi served as Chief Executive Officer for 35 years. Through his careful stewardship, Pi Kappa Phi grew from 52 chapters to 141. At the time of his retirement, 78% of members were initiated while he was Chief Executive Officer. Without his guidance, our Fraternity would not be one of the top 10 largest fraternities.

Once selected, Capstone Project teams should submit their significant figures to the New Member Education Committee. If possible, each Capstone Project team should analyze a different significant figure in Pi Kappa Phi's history.

### Next Week: Exceptional Leadership

During the fourth week of associate member education, Capstone Project teams should analyze the leadership style of the figure they selected and determine how they can practice that style of leadership in their area of focus.



## UTILIZING GUEST FACILITATORS

Throughout the Model Associate Member Education Program, you may invite guests to facilitate specific discussions or activities. Guest facilitators are great resources and, in some cases, they may even be leveraged as subject matter experts (e.g. the Risk Manager discussing Pi Kappa Phi's risk management policy).

During Week Three: Our Founders' Legacy, you may consider inviting the following guests to facilitate sections of the curriculum:

- Archon, Chaplain, Risk Manager, or Standards Board Chairman: Values into Action

When using guest facilitators, be sure to walk them through the facilitator's guide in advance of the meeting, reviewing any talking points or activities that they should facilitate. Additionally, remind guest facilitators to respect the integrity of the curriculum. Those who do not should not be asked to facilitate again in the future.

## PRE-AUTHORIZED MODIFICATIONS

While the Model Associate Member Education Program is a shared associate member education experience, each chapter may need to make changes to the program based on the needs of their members. The modifications below have been authorized by the National Headquarters for use by any chapter.

Choose from as many of the modifications below as you would like. If you select any of the modifications, be sure to include their selection as part of your program date submission on Chapter Gateway.

- Remove the Chapter History round from History Trivia.
- Direct associate members to the digital version of handouts instead of printing them.
- Offer a weekly take-home quiz instead of one taken in the education session.
- Invite Big Brothers to participate in the Ultimate Respect subordinate ritual.
- Facilitate a subordinate ritual other than Ultimate Respect. Other subordinate rituals must be included in the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*.

**Note that, unless previously approved in writing on or before August 1, 2019 by the National Headquarters, your chapter may not make modifications to the Model Associate Member Education Program other than those listed above.**

# WEEK THREE

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## EDUCATION SESSION (2 hours & 45 minutes)

### Session Outcomes

As a result of participating in this education session, associate members should be able to:

- Describe the key events and figures in fraternal, Pi Kappa Phi, and chapter history.
- Define each of Pi Kappa Phi's public values.
- Identify their personal values.
- Describe how values impact the way we see and interact with the world around us.

### Preparing for the Session

#### Setup Instructions

- Tables and chairs set in small groups or pods.
- Tape the four signs for Values into Action on four different walls in the room. If possible, place "Strongly Disagree" and "Strongly Agree" on opposite walls.
- You will need access to flip chart paper or a whiteboard. When you should record something on the flip chart paper or whiteboard, the facilitator guide will prompt you with the following cue: **FLIP CHART**.

#### Supplies Needed

- Scratch paper or a digital word processor (e.g. Microsoft Word) to keep track of points earned by each team during History Trivia, as well as for each team to record their answers for each round.
- History Trivia Questions & Answers to reference during History Trivia.
- Copies of each of the following handouts for each associate member:
  - Identifying My Values.
  - Phinal Thought: Week Three.
  - Week Three: Our Founders' Legacy quiz.
- Four signs that state: Strongly Agree, Strongly Disagree, Agree, Disagree
- Extra pens or pencils for associate members (if they lose theirs).
- Flip chart paper and markers.

# OUR FOUNDERS' LEGACY

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## Week Three Welcome - 10 minutes

- Welcome associate members to the third week of associate member education.

I know we covered a lot of topics during last week's associate member retreat. I also know some of them were more challenging than others. Before we dive into the activities for this week, I want to see where you stand as an associate member class.

- Explain that you will share a series of statements. When you read each statement, associate members should stand in a place that best describes what they think. You may use the Strongly Agree and Strongly Disagree signs to represent the two extremes of the spectrum.
- Consider asking questions to better understand why an associate member chose to stand where they did. If necessary, take notes so that you can have follow-up conversations with associate members, Big Brothers, or other chapter members.

**My Big Brother and I have met outside of associate member education.**

**I have gone out of my way to try and get to know other associate members.**

**Initiated members have gone out of their way to make me feel welcome within the chapter.**

**I have participated fully in each activity, even when it pushed me outside of my comfort zone.**

**I feel empowered to use Ultimate Respect to share feedback with any member of this fraternity, regardless of age, position, or initiation status.**

**My Pi Kappa Phi experience is helping me become a better leader.**

- Thank everyone for participating and instruct them to return to their seats.

The theme for this week of associate member education is "Our Founders' Legacy." Today we will be diving deeply into Pi Kappa Phi's history and exploring the values that shape not only our fraternity but the way we see and interact with the world.

What questions do you have before we begin?

## History Trivia - 70 minutes

It has been said again and again that those who do not learn from history are destined to repeat it. Pi Kappa Phi asks all associate members to learn our history not to challenge your ability to memorize names, chapters, and dates, but to help you fully understand the values that drove our creation and still guide us today.

# WEEK THREE

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Part of your homework for the week was to familiarize yourself with fraternity history. Instead of lecturing about all of our history, I want to give you all a chance to show what you've learned so far through a friendly competition.

- Explain that associate members will participate in history trivia.
- There should be five total rounds, each relating to a specific part of fraternity history:
  - Round One: Fraternal History
  - Round Two: The Founding of Pi Kappa Phi
  - Round Three: The 20<sup>th</sup> Century
  - Round Four: The 21<sup>st</sup> Century
  - Round Five: Chapter History
- Winners should be announced for each round and the team with the highest total points should be declared the overall winner. Winning teams should earn prizes.
- Associate members may not use their notes, *The White Diamond*, or their phone to find answers during trivia. They must rely on the combined knowledge of their group.
- Clarify any questions from associate members.
- Let associate members choose their teams for History Trivia.
  - If your chapter has an associate member class of 10 or less, consider having associate members compete individually, instead of in teams.
  - If your chapter has an associate member class of 11 to 25, consider having associate members break into teams of three to five members.
  - If your chapter has an associate member class of greater than 25, consider having associate members break into teams of five to seven members.
- Ask teams to spend one minute creating their team name. While they are brainstorming their team name, pass out five sheets of scratch paper to each team. After a minute has passed, ask teams to announce their team name to the large group.
- Reference the History Trivia Questions & Answers resource on the Pi Kapp Resource Library for the questions to ask during each round. After asking each question, give teams an appropriate amount of time to write down their answer (typically 30-45 seconds).
- When you finish each round, collect the answers from each team before sharing the correct answers. If possible, have a member of the New Member Education Committee help with scoring so that you can move quickly.
- After you finish all five rounds, announce the overall winner and distribute prizes to each winning team.

Thank you all for participating. As I shared before, it is important that all members share a common understanding of the guiding principles and values of our organization which are taught by the people and events that shape our history.

## Values of Pi Kappa Phi - 15 minutes

With an understanding of our history, we can begin to study the guiding principles and values of our Fraternity. Values are the driving force behind any person or organization. They shape the way in which we see ourselves and inform how we interact with others.

In which documents might you be able to find the values of Pi Kappa Phi?

- If associate members don't bring them up, be sure to share the following:
  - Pi Kappa Phi's public values statement
  - The Student Creed
  - The Ritual of Initiation

The values of our Founders are perhaps best captured in Pi Kappa Phi's Ritual of Initiation, which you will have the opportunity to participate in within the next three weeks. The Student Creed was authored in 1932 - 10 years after Kroeg's passing - and truly captured the essence of Pi Kappa Phi in a way that can be explained to exoterically, or publicly.

It is important that each member knows The Student Creed for this reason.

- Share any chapter traditions around The Student Creed, such as reciting it at each chapter meeting.
- Ask associate members, as a class, to recite The Student Creed.

Pi Kappa Phi's public values statement was adopted by the 54<sup>th</sup> Supreme Chapter in 2014. Each value was derived from a specific part of The Student Creed.

What are Pi Kappa Phi's seven public values?

- As associate members identify each of the seven public values, ask them to define the value in their own words.
- **FLIP CHART** each of Pi Kappa Phi's public values and their definitions. Each are provided below for your reference:
  - Common Loyalty: a commitment to Pi Kappa Phi that transcends any personal selfishness.
  - Personal Responsibility: the expectation that you live both your personal values, as well as those espoused in the Fraternity's Ritual of Initiation.
  - Achievement: the expectation that you find your passion and excel.
  - Accountability: the duty to uphold and abide by the Fraternity's standards of conduct and to use Ultimate Respect when confronting brothers who fail in their obligations to Pi Kappa Phi.
  - Campus Involvement: the obligation to become engaged in the college or university community.
  - Responsible Citizenship: the duty to lead and the privilege to serve others in order to better the world around you.

# WEEK THREE

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- Lifelong Commitment: the obligation to remain involved in Pi Kappa Phi after graduation and to work perpetually to build the ideal fraternity.

**Which stanza of The Student Creed does each value best pair with?**

- Correct answers provided below for reference:
  - Common loyalty: “Who are bound together in a common loyalty which transcends any personal selfishness;”
  - Personal Responsibility: “Who realize that membership means personal responsibility in bearing their share of the financial burden of the chapter and the national organization;”
  - Achievement: “Who bring credit to the fraternity by striving to attain the highest possible standards of scholarship;”
  - Accountability: “Who safeguard the reputation of their chapter by keeping careful watch over their personal conduct;”
  - Campus Involvement: “Who uphold faithfully the traditions and activities of their college;”
  - Responsible Citizenship: “Who prepare themselves diligently to shoulder their full responsibility as citizens;”
  - Lifelong Commitment: “I believe that my chapter can become an ideal chapter, and I shall do my share to make it so.”

The Student Creed is a call to action to each member. It challenges each of us to do our share to make our chapter more like an ideal chapter. To do that though, we must have a clear understanding of not only Pi Kappa Phi’s values, but our own.

## Personal Values - 20 minutes

Earlier, I spoke about how values help us understand why an organization exists. Values also inform the way in which we see the world. Our values are influenced by our upbringing, our environment, and the people we surround ourselves with. They are reinforced by our behavior each and every day.

To make the most of this conversation, we will want to name our values. For some of you, this may be familiar territory. For others, this might be new. Let’s keep that in mind as we move forward.

- Pass out the Identifying My Values handout and ask associate members to spend the next 10 minutes completing it.
- After associate members complete the activity, ask the following processing questions.

**Have these always been your values? Do you remember when one of these values became important to you?**

**What is an example of a time you’ve made a decision using one of these values?**

# OUR FOUNDERS' LEGACY

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What is an example of a time you've made a decision that has gone against one of your values? What made you make that choice?

How might our values influence how we lead?

It is important to note that, due to your life experiences, the people you surround yourself with, or your behavior, you may find your values changing over time.

Executive Director Emeritus and Honorary Fourth Founder Durward W. Owen, Xi (Roanoke), once said "There are no great acts. Only small acts of great kindness."

What do you think Durward meant by that?

How might Durward's quote relate to living our values?

- If associate members don't bring it up, be sure to mention: If we reinforce our values through our behavior, the small decisions we make will have just as much of an impact - if not greater - on our values as the large decisions.

## Values Into Action - 30 minutes

Now that we have a strong understanding of our personal and fraternal values, we will participate in an activity which will help us understand how we put our values into action. There are four signs around the room, labeled: Strongly Agree; Somewhat Agree; Somewhat Disagree; and Strongly Disagree.

- If necessary, point out where each sign is posted in the room.

I am going to share a series of statements. Once I have completed each statement, please go to the sign that most accurately describes your thoughts and feelings. Note that there is no riding the fence or choosing the middle ground. You must take a stand!

- After reading each statement and allowing the participants to move to their sign, ask one person at each station to answer the following questions:
  - How did one of your values inform your decision to take a stand?
  - How might your peers react to you making this decision if they saw you exhibiting your value the way you are now?

It is OKAY to skip a chapter event.

It is OKAY to get average grades.

It is OKAY to pay your chapter dues late, as long as you pay them.

It is OKAY to do the bare minimum in class, work, or extracurricular activities.

It is OKAY to skip a homework assignment for associate member education.

# WEEK THREE

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It is OKAY to skip a Capstone Project team meeting.

It is OKAY to disagree publicly with another member during a chapter event.

It is OKAY to use Ultimate Respect with a senior member of the chapter.

It is OKAY to break a chapter, campus, or national rule or policy, as long as others are breaking that rule or policy too.

It is OKAY to accept alcohol as a gift from an initiated member if you aren't 21.

It is OKAY to attend a chapter meeting while drunk or high.

It is OKAY to take Adderall or other prescription drugs if a member offers them to you.

It is OKAY to drink until you pass out.

**Final statement:** a member's personal actions/behaviors are totally separate from their membership in the chapter.

- Thank associate members for their participation and ask them to return to their seats.
- Once associate members have returned to their seats, move forward with the following debrief questions.

**How difficult was it to choose where to stand?**

**Were you ever in one place then realized you should be somewhere else? How does this relate to your daily life?**

**Do we as fraternity men "wear" our values for people to see? How do people know we are in a fraternity?**

**Do we ever find ourselves saying our values are one thing, then doing another? When? Is this a problem? Why or why not?**

**Why is it important to discuss our values?**

- Be sure to reiterate that values are the foundation upon which the Founders built Pi Kappa Phi.
- Ask each participant to find a partner and share one (1) thing they will commit to doing to demonstrate their personal and fraternal values within the next week.



# OUR FOUNDERS' LEGACY

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## Week Three Wrap-Up - 20 minutes

As this week's lesson about Our Founders' Legacy comes to a close, I want to leave you with a few words from Founder Mixson.

“The success of Pi Kappa Phi can be attributed to two things. From the beginning we had the right principles. But in that regard, we were no different from other organizations which start bravely but fall. Yes, in 1904 we sparked the idea, but it is to those men who came after that we owe our wonderful Pi Kappa Phi...We have given you the past as we know it. The future we will leave with you.”

- Pass out the Phinal Thought: Week Three handout.
- Ask associate members to spend 10 minutes silently completing the reflection.

Additionally, I want to share your homework for the upcoming week.

- Remind associate members to complete Part One of GreekLifeEdu if they haven't already.
- Share the homework for Week Three: Our Founders' Legacy:
  - Read Chapter Seven: Responsible Citizenship (pages 166-185, 2019 edition) of *The White Diamond*.
  - Familiarize yourself with Pi Kappa Phi's definition of leadership (page 166, 2019 edition of *The White Diamond*).
  - Familiarize yourself with people-first language (pages 179-180, 2019 edition of *The White Diamond*).
  - Meet with your Capstone Project team to identify a significant figure in Pi Kappa Phi's history and describe how that person impacted the Fraternity. Once selected, confirm your selection with the New Member Education Committee.

Before we move into our subordinate ritual for the week, we are going to participate in our weekly quiz.

- Pass out the Week Three: Our Founders' Legacy quiz and ask associate members to spend the next 10 minutes completing it.
- Once associate members complete the quiz, the Ultimate Respect subordinate ritual can begin.

# WEEK THREE

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## ULTIMATE RESPECT SUBORDINATE RITUAL (2 hours)

### Preparing for the Session

The setup instructions, supplies needed, and ceremony script can be found in the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*. When planning for any subordinate ritual, coordinate with the Chaplain to ensure all materials are collected and a room has been secured for the activity.

As with any other subordinate ritual, the Ultimate Respect subordinate ritual is exoteric (not secret). Consider inviting Big Brothers, the Executive Council, or other initiated members of the chapter to participate in the subordinate ritual.

If your chapter does not have a copy of the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, you may order one by contacting your Leadership Consultant or Chapter Relationship Manager.

### Setup Instructions

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 23.

### Supplies Needed

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 23.

### Set-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the set-up of the Ultimate Respect subordinate ritual.
- To save time, the chapter may choose to facilitate the Ultimate Respect subordinate ritual in a separate room from the education session.

### Ceremony Performance - 75 minutes

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 23.

## Ultimate Respect Debrief - 15 minutes

- Sample questions to debrief the Ultimate Respect subordinate ritual can be found on page 23 of the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*.

## Clean-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the clean-up of the Ultimate Respect subordinate ritual.





# WEEKLY OVERVIEW

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## OVERVIEW

During the fourth week of associate member education, associate members will fully explore Pi Kappa Phi's definition of leadership, learn about the core functions of The Ability Experience, and live the mission of The Ability Experience by participating in a friendship visit.

To prepare for this week's events and activities, the Warden should:

- Confirm the friendship visit and any logistical needs with the Philanthropy Chairman.
- Coordinate the subordinate ritual with the Chaplain.
- Gather all materials and supplies needed for the subordinate ritual, education session, and activities.

With all activities considered, the New Member Education Committee can expect to spend up to seven hours planning and executing the programming for this week. Big Brothers can expect to spend up to two hours participating in associate member activities this week. Associate members can expect to spend up to five hours participating in associate member activities - including homework - this week.

## EDUCATION SESSION (2 hours & 35 minutes)

- Week Four Welcome (10 minutes)
- Leadership in Pi Kappa Phi (15 minutes)
- The Ability Experience (15 minutes)
- Preparing for the Friendship Visit (15 minutes)
- Friendship Visit (60 minutes)
- Friendship Visit Debrief (20 minutes)
- Week Four Wrap-Up (20 minutes)

## MAN IN THE GLASS (1 hour)

- Set-up (15 minutes)
- Performance (15 minutes)
- Debrief (15 minutes)
- Clean-Up (15 minutes)

# EXCEPTIONAL LEADERSHIP

## EXAMPLE SCHEDULE

The schedule below represents an example of what Week Four: Exceptional Leadership may look like when facilitated by a chapter. Note that the dates, times, and locations of subordinate rituals, education sessions, and quizzes for each week may be determined by the chapter, but all activities should start and end at a reasonable time.

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
MODEL PROGRAM				Education Session Friendship Visit Quiz #4		Man in the Glass	Capstone Project Team Meeting
CHAPTER ACTIVITIES	Chapter Meeting			Brotherhood Event			

# WEEKLY OVERVIEW

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## CAPSTONE PROJECT CHECK-IN

Serving as the culmination of the associate member education process, the Capstone Project asks each associate member to analyze the leadership style of a significant figure within Pi Kappa Phi and describe how that figure impacted Pi Kappa Phi, then identify an area of personal interest or passion and describe how they will practice leadership and make an impact in that area.

Each week, this section will offer tips to the New Member Education Committee to ensure that associate members remain on-track with their Capstone Project.

### **This Week: Exceptional Leadership**

With their area of focus and historical figure selected, Capstone Project teams can spend this week connecting the two points.

First, Capstone Project teams should analyze the leadership style of the significant figure they selected. When doing so, they should clearly link the actions taken by the figure to Pi Kappa Phi's definition of leadership.

Afterward, Capstone Project teams should determine how they will emulate that figure's leadership style in their team's area of focus. The connection is the most important part of the Capstone Project. If the connection is not clearly made, the presentation facilitated during Week Six: The Second Decision will appear disjointed or disorganized.

Capstone Project teams should rely on Big Brothers and the New Member Education Committee to ensure that they are appropriately linking their areas of focus with the leadership style of the figure that they selected.

### **Next Week: Your Journey**

During Week Five: Your Journey, Capstone Project teams should draft their Capstone Project presentation. This should include any supplemental materials or resource they want to include, such as PowerPoints, handouts, etc...



## UTILIZING GUEST FACILITATORS

Throughout the Model Associate Member Education Program, you may invite guests to facilitate specific discussions or activities. Guest facilitators are great resources and, in some cases, they may even be leveraged as subject matter experts (e.g. the Risk Manager discussing Pi Kappa Phi's risk management policy).

During Week Four: Exceptional Leadership, you may consider inviting the following guests to facilitate sections of the curriculum:

- Chapter Advisor, Archon: Leadership in Pi Kappa Phi
- Philanthropy Chairman: Preparing for the Friendship Visit, Friendship Visit Debrief

When using guest facilitators, be sure to walk them through the facilitator's guide in advance of the meeting, reviewing any talking points or activities that they should facilitate. Additionally, remind guest facilitators to respect the integrity of the curriculum. Those who do not should not be asked to facilitate again in the future.

## PRE-AUTHORIZED MODIFICATIONS

While the Model Associate Member Education Program is a shared associate member education experience, each chapter may need to make changes to the program based on the needs of their members. The modifications below have been authorized by the National Headquarters for use by any chapter.

Choose from as many of the modifications below as you would like. If you select any of the modifications, be sure to include their selection as part of your program date submission on Chapter Gateway.

- Facilitate an awareness or volunteer event that is not a friendship visit. Examples include empathy dinners or a Spread the Word to End the Word campaign. The friendship visit may not be substituted by a fundraiser.
- Direct associate members to the digital version of handouts instead of printing them.
- Offer a weekly take-home quiz instead of one taken in the education session.
- Facilitate a subordinate ritual other than Man in the Glass. Other subordinate rituals must be included in the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*.

**Note that, unless previously approved in writing on or before August 1, 2019 by the National Headquarters, your chapter may not make modifications to the Model Associate Member Education Program other than those listed above.**

# WEEK FOUR

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## EDUCATION SESSION (2 hours & 35 minutes)

### Session Outcomes

As a result of participating in this education session, associate members should be able to:

- Describe the key characteristics of Pi Kappa Phi’s definition of leadership.
- Describe the areas of focus, as well as mission and vision, of The Ability Experience.
- Communicate the value and importance of volunteerism to the Pi Kappa Phi experience.

### Preparing for the Session

#### Setup Instructions

- Tables and chairs set in a large horseshoe, or U, shape
- You will need access to flip chart paper or a whiteboard. When you should record something on the flip chart paper or whiteboard, the facilitator guide will prompt you with the following cue: **FLIP CHART**.

#### Supplies Needed

- Bring the flip chart titled “Expectations for Each Other” from Week One: Orientation to Pi Kappa Phi.
- Copies of each of the following handouts for each associate member:
  - Phinal Thought: Week Four.
  - Week Four: Exceptional Leadership quiz.
  - Leadership in Pi Kappa Phi definition.
- Extra pens or pencils for associate members (if they lose theirs).
- Flip chart paper and markers.

### Week Four Welcome - 10 minutes

- Welcome associate members to the fourth week of associate member education.

Last week, we had the opportunity to reflect on and discuss Pi Kappa Phi’s history and guiding principles. Today, we turn our focus toward the people and practices that have made Pi Kappa Phi uncommon. Our theme is “Exceptional Leadership.”

Before we move forward with the week’s lesson, however, I want to check back in regarding the expectations that we set in Week One: Orientation to Pi Kappa Phi.

# EXCEPTIONAL LEADERSHIP

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- Reveal the expectations flip chart sheet(s) from Week One: Orientation to Pi Kappa Phi and ask for volunteers to read aloud each expectation.
- Ask participants to give a thumbs up or thumbs down if they feel as if they personally have upheld the expectation. If participants give a thumbs down, consider asking how they might change the way they approach these expectations throughout the remainder of the associate member education process.

**I have one more expectation to add to our list.**

**As most of you know, some of us are naturally more outgoing and extraverted than others; this can be especially evident in a group setting like this. As we continue through the remainder of the program, I want to challenge all of you to either step up or step back.**

- **FLIP CHART** the expectation “Step up or step back” on the sheet titled “Expectations for Each Other.”

**If your natural inclination is to share with the group, step back and give others space to share. Some may need some extra time to share. If you don’t enjoy sharing with the group or find it a bit intimidating, we care. We want to hear your thoughts and learn from you.**

**What questions do you have before we begin?**

## **Leadership in Pi Kappa Phi - 15 minutes**

**Throughout your associate member education, we have referenced Pi Kappa Phi’s definition of leadership. As we think about the leaders that have guided and shaped our Fraternity, it is only fitting that we take a moment to review that definition again.**

- Pass out the Leadership in Pi Kappa Phi definition handout and ask for volunteers to read it aloud.

**What are some of the main things that you can take away from this definition of leadership?**

- **FLIP CHART** the key points below if associate members do not share them:
  - Anyone - regardless of position, seniority, or initiation status - can practice leadership.
  - Leadership is something that anyone can do but it does take practice to master.
  - Leaders acknowledge their strengths and weaknesses, successes and failures.
  - Leaders choose to live ethically and embody by their values, as well as those of the fraternity.
  - Leaders build teams that can work together to accomplish more than they could as individuals.
  - Leaders do everything they can to make the world a better place for themselves and others.

# WEEK FOUR

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Keeping this definition in mind, how have you seen individual members in our chapter practice leadership?

- Associate members may choose to share examples of other associate members in the room, of their Big Brothers, or of other chapter members.
- As associate members share, make sure they relate their example back to one of the key points listed on the flip chart paper.

How have significant figures throughout Pi Kappa Phi's history practiced leadership?

- If associate members struggle to answer this question, consider sharing the examples below:
  - Andrew Alexander Kroeg Jr. built a team of individuals with different strengths to challenge the fraternity system at the College of Charleston.
  - Theodore Barnwell Kelly practiced leadership by - with no formal title - chartering the Gamma (UC - Berkeley) chapter.
  - Durward W. Owen, Xi (Roanoke), practiced leadership by collaborating with Thomas Sayre, Kappa (UNC - Chapel Hill), to found The Ability Experience and recognize the abilities of all people.
- As with the previous question, make sure associate members relate their example back to one of the key points on the flip chart paper.

If we embrace this definition of leadership - just as those leaders did - we can realize our full potential as leaders, make our chapter more like an ideal chapter, and - most importantly - better the world around us.

As you continue to work on your Capstone Project, I encourage you to look to Mr. Pi Kappa Phi and the inductees of the Pi Kappa Phi Hall of Fame for examples of men who have fully realized their potential.

- If associate members have questions about either award, a short description is provided for each below.
  - Mr. Pi Kappa Phi (Appendix H, 2019 edition of *The White Diamond*): the highest honor bestowed upon a member, recognizing the superior lifetime achievement of a Pi Kappa Phi.
  - Hall of Fame (Appendix I, 2019 edition of *The White Diamond*): this award recognizes those brothers whose achievements have brought credit and distinction to our fraternity. The industry of achievement (e.g. sports, government, or literature) is recognized as well.

We will spend the remainder of our time today focusing on perhaps the greatest example of leadership in Pi Kappa Phi's history.

## The Ability Experience - 15 minutes

When we describe Pi Kappa Phi as an uncommon fraternity or say that it offers uncommon opportunities to members, we mean it. To date, Pi Kappa Phi remains the only fraternity or sorority to successfully establish and maintain its own nonprofit organization: The Ability Experience.

For over 40 years, the members of Pi Kappa Phi have been committed to three areas of focus for The Ability Experience.

What are they?

- **FLIP CHART** each of the areas of focus below. The descriptions for each are provided for your reference.
  - Fundraising: Through The Ability Experience, Pi Kappa Phi annually raises more than \$1.8 million on behalf of people with disabilities through local, regional, and national initiatives and programs.
  - Awareness: The Ability Experience strives to educate the men of Pi Kappa Phi and the general public on the abilities of people with disabilities and the importance of putting a person before their disability by using people-first language.
  - Volunteerism: the spirit of The Ability Experience is carried on through volunteer relationships between chapters of Pi Kappa Phi and community organizations that help enhance the lives of people with disabilities.
- When reviewing each of the areas of focus, consider sharing how your chapter supports The Ability Experience in that way. For example, if your chapter has weekly friendship visits, you might highlight that when discussing awareness or volunteerism.

It is with these areas of focus in mind that we can help The Ability Experience accomplish its mission and vision.

What are the mission and vision of The Ability Experience?

- The mission and vision of The Ability Experience are provided below for your reference:
  - Mission: We use shared experiences to support people with disabilities and develop the men of Pi Kappa Phi into servant leaders.
  - Vision: Create a community, one relationship at a time, where the abilities of all people are recognized and valued.

Thinking back to Week Two: An Uncommon Brotherhood, how might the idea of inclusive leadership relate to the mission and vision of The Ability Experience?

- The key themes of inclusive leadership are provided below for your reference:
  - Inclusive leaders are aware of their own biases and worldview.
  - Inclusive leaders seek out perspectives other than their own so that they can make better or more well-informed decisions.

# WEEK FOUR

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- Inclusive leaders understand that inclusive teams can achieve more than homogenous teams.
- Inclusive leaders use their power to create more equitable systems.

**Thinking back to last week’s conversation about the values of Pi Kappa Phi, which values might relate closely to the mission and vision of The Ability Experience?**

- While associate members may connect any value with the mission and vision of The Ability Experience, be sure they understand that responsible citizenship aligns most closely. The definition of responsible citizenship, per Pi Kappa Phi’s public values statement, is provided below for your reference:
  - Responsible citizenship: the duty to lead and the privilege to serve others in order to better the world around you.

**Why do you think I referred to the founding of The Ability Experience as the greatest example of leadership in Pi Kappa Phi?**

**Many members say that they joined Pi Kappa Phi because they felt as though they belonged but they stayed because of the impact they could make in the lives of others through The Ability Experience. To only talk about our philanthropy does not do it justice, however.**

## Preparing for the Friendship Visit - 20 minutes

- If your chapter chooses to facilitate an activity other than the friendship visit, you may need to tailor this section to the activity that the chapter is facilitating.
- If possible, invite Big Brothers to participate in the friendship visit to help associate members feel more comfortable.
- If other initiated members are invited to attend the friendship visit, they should participate in this preparation activity as well.

**As part of associate member education for this week, each of you will have the opportunity to participate in an activity called a friendship visit. Through this activity, you will get to live out the mission and vision of The Ability Experience by getting hands-on experience building friendships with people with disabilities.**

**Before we participate in that activity, let’s take a few minutes to discuss how we interact with people with disabilities.**

**As we discussed in Week Two: An Uncommon Brotherhood, our perceptions of others can be directly influenced by the words we associate with them. You may notice that I use the phrase “people with disabilities” to describe the people that we work with.**

**Why do you think I use that phrase instead of another, like “disabled people?”**

- Be sure to share that you are using people-first language.

# EXCEPTIONAL LEADERSHIP

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The concept behind people-first language is simple: recognize an individual as a person first and as having a disability second.

What might be some examples of people-first language?

- If associate members struggle to come up with examples, consider sharing one or more of the examples below:
  - “The child with Down Syndrome” instead of “the Down Syndrome child.”
  - “She has a learning disability” instead of “she is learning disabled.”
  - “He has autism” instead of “He is autistic.”

Why do you think it is important that we recognize a person before we recognize a disability that may affect them?

- Be sure to touch on each of the following points if associate members do not:
  - People-first language is used to indicate a condition a person has rather than who a person is.
  - When we fail to use people-first language, we imply that a person has limited potential.

When we use people-first language, we are exhibiting self-awareness and actively choosing to recognize the power that our words carry. There are some words that are never okay to use. We can all likely think of a few, but I won't ask you to share them.

What I do want to acknowledge is that it is never okay to use the “r-word,” even casually. Many people do not think of this word as hate speech, but that is exactly what it feels like to millions of people with intellectual disabilities, their families, and friends. It hurts - even if you don't mean it that way.

What questions do you have about people-first language?

Finally, I want us to discuss appropriate conduct for friendship visits.

Has anyone had the opportunity to interact with someone with a disability before?

- Don't be surprised if no one has. If someone does have experience, ask them to describe what it was like and share any tips that they have with the rest of the associate member class.

How should you act when interacting with people with disabilities?

- **FLIP CHART** each of the expectations below, as well as any others identified by associate members. Additional details are provided for each expectation for your reference.
  - Be yourself: everyone will feel more comfortable when you relax. Maintain the eye contact and body language you would normally use during any other conversation.

# WEEK FOUR

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- Focus on the friendship: remember that our overall goal during a friendship visit or other volunteering event is to build friendships.
- Be patient: not only with the person with the disability but with yourself. Frustration may come from both sides of the conversation and needs to be understood and dealt with by both parties.
- Put the person first: you are interacting with individuals who have disabilities, not disabilities.
- Keep it comfortable: if you meet someone seated in a wheelchair (or any person), extend your hand to shake if that is what you normally do. When speaking to someone who uses a wheelchair, remember to give the person a comfortable viewing angle of yourself. Having to look straight up is not a comfortable viewing angle.
- Don't assume: if you are unfamiliar with someone or their disability, it is better to wait until they describe their situation to you than to make your own assumptions about them. Many types of disabilities have similar characteristics, and your assumptions may be wrong.
- Practice respect: don't be overly friendly, paternalistic, or condescending when speaking to a person with a disability. Most people, even if they are unable to speak to you in a "normal" manner, have normal or above-average intelligence. Your use of abnormal speech or simplistic language will lessen the chances of having a successful conversation.
- Set boundaries: if you don't feel comfortable sharing your contact information with someone or engaging in physical interaction beyond a handshake (e.g. hugs), say so respectfully.

While these tips might seem like a lot, the most important thing is to remember to be yourself. By keeping that tip in mind, you will feel much more comfortable.

What final questions do you have before we move on to the friendship visit?

- After associate members share any final questions they have, share the details for the friendship visit. Ideally, the friendship visit date & time aligns with your associate member education meeting time.

## Friendship Visit - 60 minutes

- If possible, Big Brothers should participate in the friendship visit as well.
- After the friendship visit, be sure to facilitate the Friendship Visit Debrief and Week Four Wrap-Up.



## Friendship Visit Debrief - 20 minutes

What did you experience during the friendship visit?

What did you expect prior to the friendship visit? How did the reality align with your expectations?

Did today's friendship visit connect with anyone's personal values? If so, which one and how?

How does continued involvement in volunteerism or awareness events further the work of The Ability Experience?

What is one thing you can do to continue to support The Ability Experience?

## Week Four Wrap-Up - 20 minutes

We've talked about a lot today. Before we go, though, we are going to participate in our weekly reflection.

- Pass out the Phinal Thought: Week Four handout.
- Ask associate members to spend 10 minutes silently completing the reflection.

Additionally, I want to share your homework for the upcoming week.

- Share the homework for Week Four: Exceptional Leadership:
  - Read Chapter Two: Our Fraternal Organization (pages 42-85, 2019 edition) of *The White Diamond*.
  - Familiarize yourself with Pi Kappa Phi's symbols (pages 62-65, 2019 edition of *The White Diamond*).
  - Familiarize yourself with the Journey programs offered by Pi Kappa Phi & The Ability Experience (pages 168-175 & 181-183, 2019 edition of *The White Diamond*).
  - Identify three Journey programs offered by Pi Kappa Phi & The Ability Experience that you want to participate in as during your time as an undergraduate member.
  - Identify three questions that you would want to ask alumni of our chapter.

Finally, we are going to participate in our weekly quiz.

- Pass out the Week Four: Exceptional Leadership quiz and ask associate members to spend the next 10 minutes completing it.
- Once associate members complete the quiz, they may be dismissed to the Man in the Glass subordinate ritual.

# WEEK FOUR

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## MAN IN THE GLASS SUBORDINATE RITUAL (1 hour)

### Preparing for the Session

The setup instructions, supplies needed, and ceremony script can be found in the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*. When planning any subordinate ritual, coordinate with the Chaplain to ensure all materials are collected and a room has been secured for the event.

As with any other subordinate ritual, the Man in the Glass subordinate ritual is exoteric (not secret). Consider inviting Big Brothers, the Executive Council, or other initiated members of the chapter to participate in the subordinate ritual.

If your chapter does not have a copy of the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, you may order one by contacting your Leadership Consultant or Chapter Relationship Manager.

### Setup Instructions

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 24.

### Supplies Needed

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 24.

### Set-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the set-up of the Man in the Glass subordinate ritual.
- To save time, the chapter may choose to facilitate the Man in the Glass subordinate ritual in a separate room from the education session.

### Ceremony Performance - 15 minutes

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 24.

## Man in the Glass Debrief - 15 minutes

- Sample questions to debrief the Pre-Initiation Ceremony can be found on page 25 of the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*.

## Clean-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the clean-up of the Man in the Glass subordinate ritual.





# WEEKLY OVERVIEW

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## OVERVIEW

During the fifth week of associate member education, associate members will review the governance of their chapter and the national organization, hear about the impact of lifelong brotherhood, and create goals for their undergraduate membership in Pi Kappa Phi.

To prepare for this week's events and activities, the Warden should:

- Collaborate with the Historian to confirm panelists for the Alumni Panel.
- Coordinate the planning of the subordinate ritual with the Chaplain.
- Confirm the locations for the Ritual of Initiation as well as the Ritual Lecture & Debrief have been secured.
- Reserve space for the Candle Watch and Capstone Project presentation.
- Gather all materials and supplies needed for the subordinate ritual, education session, and activities.

With all activities considered, the New Member Education Committee can expect to spend up to seven hours planning and executing the programming for this week. Big Brothers can expect to spend up to two hours participating in associate member activities this week. Associate members can expect to spend up to five hours participating in associate member activities - including homework - this week.

## EDUCATION SESSION (2 hours & 45 minutes)

- Week Five Welcome (5 minutes)
- Pi Kappa Phi Today (30 minutes)
- Chapter Governance (20 minutes)
- Alumni Panel (60 minutes)
- Creating Your Journey Map (30 minutes)
- Week Five Wrap-Up (20 minutes)

## WATER (1 hour)

- Set-up (15 minutes)
- Performance (15 minutes)
- Debrief (15 minutes)
- Clean-Up (15 minutes)

## EXAMPLE SCHEDULE

The schedule below represents an example of what Week Five: Your Journey may look like when facilitated by a chapter. Note that the dates, times, and locations of subordinate rituals, education sessions, and quizzes for each week may be determined by the chapter, but all activities should start and end at a reasonable time.

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
MODEL PROGRAM				Education Session Quiz #5		Water	Capstone Project Team Meeting
CHAPTER ACTIVITIES	Chapter Meeting						

# WEEKLY OVERVIEW

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## CAPSTONE PROJECT CHECK-IN

Serving as the culmination of the associate member education process, the Capstone Project asks each associate member to analyze the leadership style of a significant figure within Pi Kappa Phi and describe how that figure impacted Pi Kappa Phi, then identify an area of personal interest or passion and describe how they will practice leadership and make an impact in that area.

Each week, this section will offer tips to the New Member Education Committee to ensure that associate members remain on-track with their Capstone Project.

### **This Week: Your Journey**

This week, Capstone Project teams should draft their Capstone Project presentation. The presentation should:

- Identify the team's area of focus and describe why the team chose it.
- Name the figure from Pi Kappa Phi's history that the team selected.
- Describe that figure's leadership style and impact on the Fraternity.
- Describe the lessons they can learn from that figure's leadership style when practicing leadership in their area of focus.
- Describe the impact they intend to make in their area of focus.

The Capstone Project team should also create any materials or resources they need for their presentation, including PowerPoints or handouts. Team members should evaluate the necessity of these materials and resources in making their points before creating them.

### **Next Week: The Second Decision**

During the final week of associate member education, Capstone Project teams will present their project to a panel of members, advisors, and/or leaders on campus or in the local community.



## UTILIZING GUEST FACILITATORS

Throughout the Model Associate Member Education Program, you may invite guests to facilitate specific discussions or activities. Guest facilitators are great resources to ease the burden of facilitating and, in some cases, they may even be leveraged as subject matter experts (e.g. the Risk Manager discussing Pi Kappa Phi's risk management policy).

During Week Five: Your Journey, you may consider inviting the following guests to facilitate sections of the curriculum:

- Archon, Chapter Advisor: Pi Kappa Phi Today, Chapter Governance
- Historian: Alumni Panel moderator

When using guest facilitators, be sure to walk them through the facilitator's guide in advance of the meeting, reviewing any talking points or activities that they should facilitate. Additionally, remind guest facilitators to respect the integrity of the curriculum. Those who do not should not be asked to facilitate again in the future.

## PRE-AUTHORIZED MODIFICATIONS

While the Model Associate Member Education Program is a shared associate member education experience, each chapter may need to make changes to the program based on the needs of their members. The modifications below have been authorized by the National Headquarters for use by any chapter.

Choose from as many of the modifications below as you would like. If you select any of the modifications, be sure to include their selection as part of your program date submission on Chapter Gateway.

- Choose not to facilitate the Alumni Panel.
- Direct associate members to the digital version of handouts instead of printing them.
- Offer a weekly take-home quiz instead of one taken in the education session.
- Facilitate a subordinate ritual other than Water. Other subordinate rituals must be included in the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*.

**Note that, unless previously approved in writing on or before August 1, 2019 by the National Headquarters, your chapter may not make modifications to the Model Associate Member Education Program other than those listed above.**

# WEEK FIVE

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## EDUCATION SESSION (2 hours & 45 minutes)

### Session Outcomes

As a result of participating in this education session, associate members should be able to:

- Describe the four entities that make up “The Greater Fraternity.”
- Identify the symbols of Pi Kappa Phi.
- Describe the governance of the chapter and national organization.
- Describe each of the Journey programs offered by Pi Kappa Phi & The Ability Experience.
- Identify goals for their undergraduate membership in Pi Kappa Phi.

### Preparing for the Session

#### Setup Instructions

- Tables and chairs set in a large horseshoe, or U, shape
- Tables and chairs set at the front of the room for the Alumni Panel.
- You will need access to flip chart paper or a whiteboard. When you should record something on the flip chart paper or whiteboard, the facilitator guide will prompt you with the following cue: **FLIP CHART**.
- If possible, you will want to prepare some flip charts prior to the retreat. Prepared flip chart paper should be hidden until you are ready to reveal them. Each of the prepared flip charts should contain the following information:
  - On one sheet of flip chart paper, write the four entities of Pi Kappa Phi listed on pages 97 & 98 of this facilitator guide.
- You may need access to audio/video equipment if any members of the Alumni Panel are participating remotely.

#### Supplies Needed

- Spot the Difference: Symbols of Pi Kappa Phi Answer Key handout.
- Copies of each of the following handouts for each associate member:
  - Spot the Difference: Symbols of Pi Kappa Phi.
  - Creating Your Journey Map.
  - Phinal Thought: Week Five.
  - Week Five: Your Journey quiz.
- Extra pens or pencils for associate members (if they lose theirs).
- Flip chart paper and markers.

## Week Five Welcome - 5 minutes

- Welcome associate members to the fifth week of associate member education.

Throughout associate member education, you've learned all about Pi Kappa Phi's past. You've learned about the chapter and the men who will soon be your brothers.

Before you participate in the Ritual of Initiation, however, it is important to look to the future and consider what you want your Pi Kappa Phi membership to look like from initiation to graduation. This week, we are talking about "Your Journey."

## Pi Kappa Phi Today - 30 minutes

Let's begin our lesson by shifting gears from past to present. Over 115 years after our humble founding in Charleston, Pi Kappa Phi is actively operating at over 180 universities. The gift of brotherhood has been shared with nearly 145,000 members; over 11,000 are currently students.

To ensure that we continue to be an admired and desired organization across the country, Pi Kappa Phi adopted a new mission, vision, and tagline in 2014.

What are they?

- Pi Kappa Phi's mission, vision, and tagline are provided below for your reference.
  - Mission: To create an uncommon and lifelong brotherhood that develops leaders and encourages service to others for the betterment of our communities.
  - Vision: A future where every Pi Kappa Phi embraces his role as a leader, puts service before self and improves the world around him.
  - Tagline: Exceptional Leaders. Uncommon Opportunities.

Additionally, you may occasionally hear Pi Kappa Phi referred to as "The Greater Fraternity."

What is being referenced when we say "The Greater Fraternity?"

- If associate members struggle to answer, share that "The Greater Fraternity" refers to the four entities that make up what we think of as Pi Kappa Phi.
- Reveal the prepared **FLIP CHART** that states each of the four entities that make up Pi Kappa Phi. Each entity, and their function, are provided below for your reference.
  - Pi Kappa Phi: the undergraduate and alumni membership of the organization, governed by the Supreme Chapter and, between meetings, the National Council.
  - Pi Kappa Phi Foundation: founded in 1948, the Foundation supports the educational and leadership initiatives of the Fraternity. It provides support directly to students through several scholarships that recognize exceptional undergraduate and alumni members.

# WEEK FIVE

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- Pi Kappa Phi Properties: for more than 30 years, Pi Kappa Phi Properties has served as the Fraternity's national housing corporation. It helps chapters acquire, construct, improve, finance, and manage housing that is competitive on their campus.
- The Ability Experience: founded in 1977 as the official philanthropy of Pi Kappa Phi with the purpose of instilling the importance of lifelong service in our members by raising funds and awareness on behalf of people with disabilities.

Since we explored The Ability Experience last week, let's focus on our fraternity's organization this week.

Pi Kappa Phi is governed by the Supreme Chapter, which meets every two years.

Who comprises the Supreme Chapter?

- A complete list is provided below for reference:
  - Current & past National Officers
  - Current & past Regional Governors
  - Past District Counselors
  - Chapter Advisors
  - Delegates of each alumni and student chapter in good standing
  - Past chapter Archons
  - Alumni members
  - Chairmen of standing committees
  - Initiated past staff members
  - Members of the Pi Alpha Society
  - Members of the Nu Phi Society
  - Hall of Fame inductees
  - Mr. Pi Kappa Phis

Despite the number of alumni that are in attendance at Supreme Chapter, the number of student votes at any given Supreme Chapter meeting accounts for 80 percent of all votes at the convention. During the convention, the Supreme Chapter elects National Officers - called the National Council - to govern the Fraternity between Supreme Chapter meetings.

What are the positions on the National Council? Who currently holds each position?

- Be sure to share the full names and chapter designations of each member of the National Council, including the Student Representative.
  - National President: Jeremy D. Galvin, Alpha Omicron (Iowa State)
  - National Vice President: William T. Sigmon, Alpha Sigma (Tennessee)
  - National Treasurer: James M. Smith, Alpha Eta (Samford)

- National Secretary: Alan P. Duesterhaus, Zeta Epsilon (George Mason)
- National Historian: Joseph A. Brady III, Epsilon Omicron (Villanova)
- National Chaplain: David T. Corey, Alpha Eta (Samford)
- National Chancellor: Michael S. Loy, Beta Eta (Florida State)
- Student Representative: Logan Ulrich, Eta Theta (San Francisco)

Pi Kappa Phi also employs a professional staff to handle the day-to-day operations of the Fraternity. Led by Chief Executive Officer Mark E. Timmes, Alpha Epsilon (Florida), the staff is headquartered in Charlotte, North Carolina at the Kelley A. Bergstrom Leadership Center of Pi Kappa Phi.

One staff member you will regularly see is our Leadership Consultant. These men are recent graduates hired to serve the Fraternity by traveling full-time to student chapters and working with chapter officers, key committee chairmen, and volunteers to advance Pi Kappa Phi's mission.

- Share the name of your Leadership Consultant and the dates of his next visit, if applicable.

Additionally, there are a number of symbols described by Pi Kappa Phi's Constitution & Supreme Laws. While you will learn of the esoteric, or secret, symbols following the Ritual of Initiation, you will want to be familiar with our exoteric, or public, symbols.

- Instruct associate members to turn to page 62 of the 2019 edition of *The White Diamond* and ask for volunteers to read aloud "Symbols of Pi Kappa Phi" by Eugene Sanders, Eta (Emory).

Instead of lecturing about each of our symbols, I would like each of you to complete an activity to familiarize yourselves with them.

- Pass out the Spot the Difference: Symbols of Pi Kappa Phi handout and ask associate members to spend the next 10 minutes completing it.
- Once associate members complete the activity, review the correct answers. Correct answers can be found in the Spot the Difference: Symbols of Pi Kappa Phi Answer Key.

What questions do you have about Pi Kappa Phi today?

## Chapter Governance - 20 minutes

In addition to familiarizing yourself with the structure of the Greater Fraternity, it will benefit you to understand how our chapter operates. While you have likely picked up some of this through the past month, we will more formally review it now to ensure everyone is on the same page.

As I mentioned earlier, Pi Kappa Phi has over 180 active chapters at universities across the nation. Once chartered, each chapter receives a Greek letter designation.

# WEEK FIVE

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- Remind associate members of your chapter's designation.

Our chapter is governed by an Executive Council, which is composed of nine members.

What are the positions of our Executive Council? Who holds each position?

- Share each officer position, excluding the Standards Board, and share who currently holds each position in your chapter.

Executive Council officers oversee the various committees that exist within our chapter to help our day-to-day operations. Getting involved in a committee is a great way to get leadership experience and prepare you to eventually hold a position on the Executive Council.

- Name each committee that your chapter uses. Be sure to share how associate members can get involved in committees if they are interested.

There is one committee that is a little different than the others: the Standards Board.

Can anyone remind me what the purpose of the Standards Board is?

Who are the members of the Standards Board?

- The members of the Standards Board as described by Supreme Law are included below for your reference. If your chapter has more members on the Standards Board, be sure to include them as well. Be sure to share who currently holds each position.
  - Standards Board Chairman
  - Sergeant-at-Arms
  - Scribe
  - General Member
  - General Member

The final part of our chapter's leadership structure is our Council of Advisors. Each chapter can receive mature adult guidance from a team of advisors. The team is overseen by a Chapter Advisor, who is appointed by the National President and provides guidance and support to chapter leaders throughout their term.

- Share the name and contact information of your Chapter Advisor.
- If applicable, share the names of the members of the Council of Advisors.

The governance of our chapter and national organization have been carefully tailored throughout the past 115 years with one goal in mind: to help you realize your potential as a leader and better the world around you. It's as T.J. Sullivan wrote in *"You Are Always Wearing Your Letters,"* "If we're doing fraternity right, then we'll make you a better man. If you're doing everything right, then you will make us a better organization."

While I can talk to you all day about how lifelong membership in Pi Kappa Phi can make you a better man, I think we will leave it to the experts; those who have experienced it.

## Alumni Panel - 60 minutes

- Be sure to have access to audio/visual equipment if any panelists are participating remotely.
- The alumni panel should consist of 3-5 alumni of various ages and careers. Consider collaborating with the Historian to select and invite panelists. An ideal panel consists of:
  - One local volunteer (e.g. Chapter Advisor)
  - One (1) young alum (22-34 years old)
  - One (1) established alum (35-60 years old)
  - One (1) senior alum (61+ years old)
- Ask each panelist to introduce themselves, sharing a little bit about themselves, their involvement in Pi Kappa Phi as an undergraduate member, and how they continue to engage with the Fraternity.
- Ask associate members to share the questions that they wrote down as homework. If they struggle to ask questions, you may consider asking the questions below:
  - Why did you join Pi Kappa Phi?
  - If you had the chance to do one thing differently as an undergraduate member, what would you change and why?
  - How has your Pi Kappa Phi experience made an impact in your life or career?
  - What one piece of advice would you want to share with our associate members?
  - How do you practice leadership in your daily life?
  - How can a member make the most of their experience in Pi Kappa Phi?
  - How is your vision for Pi Kappa Phi as an undergraduate member similar or different to where the chapter is now?
- The panel should last 45 minutes. After 45 minutes, thank the panelists for their time and give associate members a short break (no more than 10 minutes) to introduce themselves to the panelists, thank them for their time, and ask any final questions individually.

## Creating Your Journey Map - 30 minutes

After hearing from our alumni and learning about our fraternal organization, it is time to begin thinking about your experience from initiation to graduation.

As you read about in *The White Diamond*, the Pi Kappa Phi Journey offers students, alumni, and volunteers the uncommon opportunities - innovative educational programs and resources - to develop into exceptional leaders.

# WEEK FIVE

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We do not want your growth to stop after you participate in the Ritual of Initiation. In fact, if it does, we have failed as a fraternity. That isn't to say that your continued member development won't look different than your associate member education. It most likely will.

To that end, we ask each associate member to spend time carefully considering the path they want to take in Pi Kappa Phi to help them achieve their personal and professional goals.

Since you have already identified the Journey programs that interest you the most, I will ask you to take time to create your Journey Map. The Journey Map will serve as a guide to your experience as an undergraduate member.

As you create your Journey Map, keep in mind that it may change over time. The important thing is that it provides you a roadmap of how you can achieve your goals.

- Pass out the Creating Your Journey Map handout and ask associate members to spend the next 10 minutes completing the handout.
- After 10 minutes, participants should find a partner to discuss their Journey Map. Each partner should be given five minutes to share their Journey Map with the other person.
- After 10 more minutes (20 minutes total), call the group back together and ask each participant to share their main hope for their undergraduate experience and the first step they will take toward making that hope a reality.
- Facilitators should be prepared to share how they will support associate members achieve the goals described in their Journey Map.
- After everyone has shared, the facilitator should share words of praise or affirmation for the associate member class, then move into the Week Five Wrap-Up.

## Week Five Wrap-Up - 20 minutes

We've talked about a lot today. Before we go, though, we are going to participate in our weekly reflection.

- Pass out the Phinal Thought: Week Five handout.
- Ask associate members to spend 10 minutes silently completing the reflection.

Additionally, I want to share your homework for the upcoming week.

- Share the homework for Week Five: Your Journey:
  - Read Chapter Eight: Lifelong Commitment (pages 186-191), 2019 edition of *The White Diamond*.
  - Read "My Name is Fraternity" (page 13), 2019 edition of *The White Diamond*.
  - Read "You Are Always Wearing Your Letters" (pages 106-109), 2019 edition of *The White Diamond*.



- Meet with your Capstone Project team and create your Capstone Project presentation.

**Finally, we are going to participate in our weekly quiz.**

- Pass out the Week Five: Your Journey quiz and ask associate members to spend the next 10 minutes completing it.
- Once associate members complete the quiz, they may be dismissed to the Water subordinate ritual.

# WEEK FIVE

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## WATER SUBORDINATE RITUAL (1 hour)

### Preparing for the Subordinate Ritual

The setup instructions, supplies needed, and ceremony script can be found in the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*. When planning any subordinate ritual, coordinate with the Chaplain to ensure all materials are collected and a room has been secured for the event.

As with any other subordinate ritual, the Water subordinate ritual is exoteric (not secret). Consider inviting Big Brothers, the Executive Council, or other initiated members of the chapter to participate in the subordinate ritual.

If your chapter does not have a copy of the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, you may order one by contacting your Leadership Consultant or Chapter Relationship Manager.

### Setup Instructions

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 14.

### Supplies Needed

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 14.

### Set-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the set-up of the Water subordinate ritual.
- To save time, the chapter may choose to facilitate the Water subordinate ritual in a separate room from the education session.

### Ceremony Performance - 15 minutes

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, page 14.

### Water Debrief - 15 minutes

- See the 2018 edition of *Subordinate Rituals & Special Ceremonies of Pi Kappa Phi*, pages 14 & 15.

## Clean-Up - 15 minutes

- The Chaplain & Ritual Committee should lead the clean-up of the Water subordinate ritual.





# WEEKLY OVERVIEW

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## OVERVIEW

During the final week of associate member education, associate members will facilitate their Capstone Project Presentation, reflect on their associate member education experience through the Candle Watch activity, and participate in the Ritual of Initiation.

To prepare for this week's events and activities, the Warden should:

- Confirm the date, time, and location for the Ritual of Initiation and Ritual of Initiation Lecture & Debrief with the Chaplain.
- Coordinate with the Secretary to ensure each associate member's initiation card is completed and submitted to the National Headquarters.
- Confirm Capstone Project panelists for all time slots.
- Confirm the location of the Candle Watch activity.
- Gather all materials and supplies needed for the education session and activities.

With all activities considered, the New Member Education Committee can expect to spend up to 10 hours planning and executing the programming for this week. Big Brothers can expect to spend up to five hours participating in associate member activities this week. Associate members can expect to spend up to seven hours participating in associate member activities - including homework - this week.

### EDUCATION SESSION (2 hours & 35 minutes)

- Week Six Welcome (20 minutes)
- The Second Decision (10 minutes)
- The Obligations of Lifelong Membership (20 minutes)
- Ritual of Initiation Pre-Brief (15 minutes)
- Addressing Concerns (30 minutes)
- Week Six Wrap-Up (20 minutes)

### CAPSTONE PROJECT PRESENTATION (20 minutes)

- Set-up (5 minutes)
- Presentation (10 minutes)
- Feedback Sharing (5 minutes)

### CANDLE WATCH REFLECTION (20 minutes)

### RITUAL OF INITIATION (20 minutes per initiate)

### RITUAL OF INITIATION LECTURE & DEBRIEF (2 hours)

# THE SECOND DECISION

## EXAMPLE SCHEDULE

The schedule below represents an example of what Week Six: The Second Decision may look like when facilitated by a chapter. Note that the dates, times, and locations of subordinate rituals, education sessions, and quizzes for each week may be determined by the chapter, but all activities should start and end at a reasonable time.

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
MODEL PROGRAM	Education Session  Quiz #6	Capstone Project Times  Candle Watch Times	Capstone Project Times  Candle Watch Times	Capstone Project Times  Candle Watch Times	Capstone Project Times  Candle Watch Times	Ritual of Initiation	Ritual of Initiation Lecture & Debrief
CHAPTER ACTIVITIES	Chapter Meeting						

# WEEKLY OVERVIEW

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## CAPSTONE PROJECT CHECK-IN

Serving as the culmination of the associate member education process, the Capstone Project asks each associate member to analyze the leadership style of a significant figure within Pi Kappa Phi and describe how that figure impacted Pi Kappa Phi, then identify an area of personal interest or passion and describe how they will practice leadership and make an impact in that area.

Each week, this section will offer tips to the New Member Education Committee to ensure that associate members remain on-track with their Capstone Project.

### This Week: The Second Decision

This week, Capstone Project teams will present their Capstone Project Presentation to a panel. The presentation should:

- Identify the team's area of focus and describe why the team chose it.
- Name the figure from Pi Kappa Phi's history that the team selected.
- Describe that figure's leadership style and impact on the Fraternity.
- Describe the lessons they can learn from that figure's leadership style when practicing leadership in their area of focus.
- Describe the impact they intend to make in their area of focus.

Each member of the Capstone Project team should have a role in the presentation.



## UTILIZING GUEST FACILITATORS

Throughout the Model Associate Member Education Program, you may invite guests to facilitate specific discussions or activities. Guest facilitators are great resources and, in some cases, they may even be leveraged as subject matter experts (e.g. the Risk Manager discussing Pi Kappa Phi's risk management policy).

During Week Six: The Second Decision, you may consider inviting the following guests to facilitate sections of the curriculum:

- Chaplain, Certified Ritualist(s): Ritual of Initiation Pre-Brief
- Archon, Chapter Advisor: Addressing Concerns

When using guest facilitators, be sure to walk them through the facilitator's guide in advance of the meeting, reviewing any talking points or activities that they should facilitate. Additionally, remind guest facilitators to respect the integrity of the curriculum. Those who do not should not be asked to facilitate again in the future.

## PRE-AUTHORIZED MODIFICATIONS

While the Model Associate Member Education Program is a shared associate member education experience, each chapter may need to make changes to the program based on the needs of their members. The modifications below have been authorized by the National Headquarters for use by any chapter.

Choose from as many of the modifications below as you would like. If you select any of the modifications, be sure to include their selection as part of your program date submission on Chapter Gateway.

- Direct associate members to the digital version of handouts instead of printing them.
- Offer a weekly take-home quiz instead of one taken in the education session.

**Note that, unless previously approved in writing on or before August 1, 2019 by the National Headquarters, your chapter may not make modifications to the Model Associate Member Education Program other than those listed above.**

# WEEK SIX

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## EDUCATION SESSION (2 hours & 35 minutes)

### Session Outcomes

As a result of participating in this education session, associate members should be able to:

- Describe the three decisions made by all members of Pi Kappa Phi.
- Be fully prepared to make a lifelong commitment to Pi Kappa Phi by participating in the Ritual of Initiation.
- Understand what will be expected from them during the Candle Watch activity and the Capstone Project presentation.

### Preparing for the Session

#### Setup Instructions

- Tables and chairs set in a large horseshoe, or U, shape
- You will need access to flip chart paper or a whiteboard. When you should record something on the flip chart paper or whiteboard, the facilitator guide will prompt you with the following cue: **FLIP CHART**.

#### Supplies Needed

- Copies of each of the following handouts for each associate member:
  - Phinal Thought: Week Six.
  - Week Six: The Second Decision quiz.
- Extra pens or pencils for associate members (if they lose theirs).
- Flip chart paper and markers.

## Week Six Welcome - 20 minutes

- Welcome associate members to the final week of associate member education.

This is the start of an auspicious week. You have spent the past five weeks learning about yourself and each other, exploring the themes of brotherhood that influence our chapter, diving into the history of fraternities, living the mission and vision of The Ability Experience, and charting the course for your future in Pi Kappa Phi.

And it has all led to this. This week, you will have the opportunity to participate in an activity called the Candle Watch, where you will get to reflect on your experiences in a journal that our chapter will maintain as a keepsake of yours - and others - initiation. You will also present your Capstone Project, sharing the area you hope to lead in and showing what you have learned over the last six weeks.

# THE SECOND DECISION

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Finally, and most importantly, you will make an important choice. Make no mistake, you must choose to participate in Pi Kappa Phi's Ritual of Initiation. We hope that after six weeks learning about our organization and building relationships with other members, you are confident and feel prepared to make a lifelong obligation to Pi Kappa Phi.

Yes, this week will end one journey, but it will begin a whole new one for each of you. One that can last far beyond your undergraduate experience. But we will not force you to participate in the Ritual of Initiation. You have to make that choice. It is a choice Pi Kappa Phi calls "The Second Decision."

Before we begin, I want to capture what we're feeling in this moment. In one word, please describe how you are feeling right now.

- Each associate member should share their one-word reflection. No one should skip or defer.
- Be sure associate members only share only one word.
- Be prepared for associate members to share that they are nervous or unsure. This is natural, as the Ritual of Initiation may be the first lifelong obligation they have made. Reassure them that you will help them be as prepared as possible heading into the Ritual of Initiation and their Capstone Project.

## The Second Decision - 10 minutes

If we are going to ask you to make The Second Decision, it is important for you to understand what the other two decisions are. Throughout their life, each Pi Kappa Phi makes three major decisions. All of these decisions, since our founding over 115 years ago, have been exactly the same. Whether you realize it or not, you have actually already made The First Decision.

What do you think The First Decision is?

- If associate members struggle to answer, be sure to share: The First Decision is to join this Fraternity instead of another. Associate members made this decision when they signed their bid.

If The First Decision is to join Pi Kappa Phi and The Second Decision is to participate in the Ritual of Initiation, what do you think The Third Decision is?

- If associate members struggle to answer, be sure to share: The Third Decision is to be an engaged alumnus after your time as a student member comes to an end. It is largely forgotten by members, but arguably the most important.

Now that we understand what the other two decisions of membership are, let's further consider The Second Decision. Through the Ritual of Initiation, you will forge a lifelong bond with the brothers of Pi Kappa Phi; a bond that can never be broken. We hope that this decision will positively impact your life for years to come.

# WEEK SIX

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Aside from choosing to participate in the Ritual of Initiation, what are some other examples of decisions that could have a positive impact on your life?

- If associate members struggle to answer, consider sharing one or more of the examples provided below:
  - Pursuing higher education
  - Choosing a career
  - Finding a partner
  - Winning the lottery

Each of those decisions can have positive and sustained impacts on your life. Aside from winning the lottery, each of these decisions require careful consideration. Which school has the best program for your major? What career will you pursue once you have completed your education? Who will you choose to spend the majority of your time with?

This chapter wants to make sure that you can make an informed decision before you participate in the Ritual of Initiation. To that end, there are a few things I want to share with you.

## The Obligations of Lifelong Membership - 20 minutes

Just as you had obligations to meet as an associate member, you will have obligations to meet as an initiated member of this Fraternity. Before you become an initiated member, it's important to understand what you will be committing to during the remainder of your undergraduate membership. Of course, your membership does not end when you graduate but the obligations of being an alum will be reviewed at a more fitting time.

- Share the time, academic, and financial expectations of all initiated members.
- Be sure to remind associate members that the obligations of initiated members can change due to the actions of the chapter. For example, dues could increase from one semester to the next.

Additionally, there are some obligations made during the Ritual of Initiation. You can think of these similarly to what The Student Creed asks of each member.

- If necessary, remind associate members of the obligations described in The Student Creed. They are provided below for your reference.
  - Put the good of the fraternity before yourself.
  - Pay your dues on time, every time.
  - Don't settle for mediocrity; achieve your potential.
  - Follow our rules and regulations.
  - Participate in campus events and activities.
  - Give back to your campus and local community.
  - Work to better your fraternity every day.

# THE SECOND DECISION

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- **FLIP CHART** the obligations that the Ritual of Initiation requires from all members.
  - Don't share Pi Kappa Phi's secrets with non-members.
  - Help other members to the best of your ability.
  - Be kind to others.
  - Abide by Pi Kappa Phi's rules and regulations.
  - Work continuously to make our Fraternity better.

Please note that these five obligations do not replace any of the other commitments you have made to the Fraternity. As an organization that asks you to achieve your full potential, it is only natural that we ask you to aspire to greater heights as you embark on your new journey as an initiated member of the Fraternity.

What questions do you have about the obligations of lifelong membership in Pi Kappa Phi?

Now that you understand what will be asked of you as an initiated member, let's discuss what you can expect from the Ritual of Initiation.

## Ritual of Initiation Pre-Brief - 15 minutes

- Ask the Chaplain to conduct the Ritual of Initiation Pre-Brief with associate members to manage their expectations for the remainder of the week.
- The Pre-Brief is detailed in Ritual of Initiation manuals from 2014 onward. If you do not have a copy of the Pre-Brief, contact your Leadership Consultant.

## Addressing Concerns - 30 minutes

- Pass out a stack of notecards to each table or a few notecards to each participant.
- Instruct them to write down any concerns or questions they have. They should write down one concern or question per notecard and they should NOT write their names on their notecard. They can write on as many notecards as they need to.
- After they have finished writing on a card, ask them to raise their card. You should collect and shuffle them.
- Once all participants finish writing, you should pass the shuffled stack of notecards back out to the group. Start with one per person and give out additional notecards to others as necessary if you have more.
- Ask each participant to read aloud the question or concern on the notecard. No one should identify who wrote the notecard.
- Facilitators should address concerns and questions thoughtfully, respectfully, and to the best of their ability as they arise.

# WEEK SIX

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## Week Six Wrap-Up - 20 minutes

You are now prepared to move forward into the week ahead. As I mentioned before, I am excited that all of you will soon get to experience the Ritual of Initiation. While it's natural to be a little nervous about this week, I want to reinforce what we discussed in the Pre-Brief: nothing you experience this week should deviate from Pi Kappa Phi's values or standards of conduct.

If you feel as if Pi Kappa Phi's values or standards have been violated this week, please contact the National Headquarters at (704) 504-0888 and ask for the Assistant Executive Director of Prevention & Accountability.

We've talked about a lot today. Before we go, though, we are going to participate in our weekly reflection.

- Pass out the Phinal Thought: Week Six handout.
- Ask associate members to spend 10 minutes silently completing the reflection.

This week, your only homework is to sign up for a time to participate in the Candle Watch activity and the Capstone Project presentation.

- Share how to sign up for Candle Watch and Capstone Project presentation times.

Finally, we are going to participate in our last weekly quiz.

- Pass out the Week Six: The Second Decision quiz and ask associate members to spend the next 10 minutes completing it.

Before we break, I would be remiss if I did not remind you to behave in a way which reflects yours, and Pi Kappa Phi's, values. While your initiation into our brotherhood is cause for celebration, please do not ruin all of the work of the past six weeks by making poor decisions.

While there is no final membership vote, members who fail to abide by Pi Kappa Phi's standards may be referred to the Standards Board and, in extreme cases, may be expelled from the Fraternity regardless of their status within the chapter.

- Answer any final questions, share any final remarks, then dismiss the group.

## CANDLE WATCH REFLECTION (20 minutes)

### Setup Instructions & Supplies Needed

#### Setup Instructions

- The reflection room should have only one associate member inside at a time and should contain a journal for associate members to record their thoughts and feelings before participating in the Ritual of Initiation.

#### Supplies Needed

- One Candle Watch instruction handout.
- One journal for associate members to record their thoughts and feelings.
- Any previous Candle Watch journals.
- Extra pens for associate members (if they lose theirs).

## Recording My Reflection - 20 minutes

- Associate members should sign up for one 20-minute time slot in which they can complete their Candle Watch reflection.
- The Candle Watch instruction handout will instruct associate members to read Epilogue: Secret Thoughts of a Ritual in their 2019 edition of *The White Diamond* (pages 193-197). After reading, associate members should record their reflections in the Candle Watch journal.
- When associate members finish their Candle Watch reflection, they should leave the room as they found it.

# WEEK SIX

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## **CAPSTONE PROJECT PRESENTATION (20 minutes)**

### **Setup Instructions & Supplies Needed**

#### **Setup Instructions**

- Tables and chairs set at the front of the room for the Capstone Project presentation panel.
- You may need access to audio/video equipment if Capstone Project teams plan to use videos or PowerPoints during their presentation.
- An Executive Council member or member of the New Member Education Committee should be present at each Capstone Project presentation to assist with logistics.

#### **Supplies Needed**

- One Capstone Project presentation evaluation form for each Capstone Project presentation panelist.
- Extra pens or pencils for panelists (if they lose theirs).

### **Capstone Project Presentation Set-Up - 5 minutes**

- During their 20-minute time slot, associate members will have five minutes to set up their Capstone Project presentation. This includes distributing any handouts, pulling up any videos or PowerPoints, or anything else necessary for their presentation.
- This time also give panelists the opportunity to switch out and review the evaluation form, if necessary.

### **Capstone Project Presentation - 10 minutes**

- Capstone Project teams will have 10 minutes to present their Capstone Project to the presentation panel. Each member of the team should have a role in the presentation.

### **Feedback Sharing - 5 minutes**

- After the presentation, the presentation panel will have five minutes to ask questions and provide feedback about the Capstone Project team's presentation.



## **RITUAL OF INITIATION (20 minutes per initiate)**

### **Setup & Supplies Needed**

- Refer to the Ritual of Initiation manual for staging instructions and ceremony text. If you do not have a copy of the Ritual of Initiation manual, contact your Leadership Consultant.

### **Ritual of Initiation Set-Up - 30 minutes**

- Work with the Chaplain & Ritual Committee to set up the Ritual of Initiation in a timely manner so your chapter can start the ceremony on time.
- Identify volunteers from the chapter who can assist with set-up.

### **Ritual of Initiation Ceremony - 20 minutes per initiate**

- For larger associate member education classes, consider running multiple concurrent tracks. As a reminder, all initiations should be conducted individually.
- While associate members wait for their turn to participate in the Ritual of Initiation, a best practice is to coordinate with the Secretary to have them complete their gold and white Initiation Cards.

### **Ritual of Initiation Clean-Up - 30 minutes**

- Work with the Chaplain & Ritual Committee to clean up the Ritual of Initiation in a timely manner.
- Identify volunteers from the chapter who can assist with clean-up.

# WORKS CITED

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## Works Cited

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