



Alumni Chapter Tool-Kit

Everything You Need To Know About Forming an Alumni Chapter



INTRODUCTION

Whether you live in the north, south, east or west, Phi Sigma Pi provides an official mechanism for you to meet up with fellow Alumni in your area: Alumni Chapters.

Founded on the same ideals as Undergraduate Chapters, Alumni Chapters recognize Brotherhood as a lifelong commitment. These regionally based Chapters are comprised of Alumni who wish to continue their active fraternal experience. Alumni Chapters provide opportunities for Alumni to continue to enjoy aspects of scholarship, leadership and fellowship in a manner different from, yet reminiscent of, their undergraduate experiences.

The concept of Alumni Chapters is not a new one for Phi Sigma Pi. In fact, in 1937, twenty-seven Brothers were doing graduate work at Pennsylvania State College/University and organized the first Alumni Chapter of the Fraternity. While this was an unofficial Phi Sigma Pi Alumni Organization, it provided the foundation to enable a small group of Alumni at Millersville University to great the first official Alumni Chapter in 1986. Forty-nine years later, a small group of Alumni met on the campus of Millersville University and formulated the first official Alumni Chapter in 1986.

Alumni Chapters can be a vital resource for the entire Fraternity if they focus on these areas:

- **Promoting the values of scholarship, leadership and fellowship through programs and activities its Members value and support.** One of the appealing aspects of being part of an Alumni Chapter is that it can be just what the Members want it to be! The organization is based on our Tripod but is designed to meet the needs of its membership--service projects, social events and other activities are all great opportunities for engagement.
- **Assisting in the Colonization and development of new and existing Collegiate Chapters.** The Fraternity's future is directly linked to its ability to protect existing Chapters and expand to new Chapters. During and after the Chapter start-up process, local Alumni are wonderful resources to lend a hand to help recruit and organize the new Chapter. By attending Collegiate Chapter meetings and events, and demonstrating support through the sharing of their knowledge, our Alumni Members can have a significant impact on the success of new Collegiate Chapters.
- **Support and strengthen the national fraternity.** Alumni are a tremendous source of knowledge and experience. Alumni organizations can provide real world practical business experience which can be leveraged to improve the overall Fraternity. Fundraising and helping the National Fraternity rally the organization around important causes are also great ways to assist.

Today, we have approximately 10 Alumni Chapters, but are seeking out interested Alumni who would like to continue building the bonds of Brotherhood well past graduation.



FORMING AN ALUMNI CHAPTER

Alumni Chapters serve Alumni based on their geographical location. Alumni Chapters are required to hold at least two business meetings a year, abide by operating policies the Chapter sets forth (bylaws), elect a President and at least two additional Officers, have representation at the annual meeting of the Grand Chapter at National Convention and submit the appropriate forms to National Headquarters. In order to maintain membership, Members must make a minimum \$31.00 donation to the Phi Sigma Pi Foundation.

Alumni Chapter Requirements: A Snapshot

- Chartered by the National Council
- Members must belong to the National Alumni Association
- A minimum of three local Chapter Officers, including a President, who are elected by Chapter membership
- Submit Annual Form 530 to the National Office
- Invitation to participate in Regional Conference planning
- Require a minimum of two (2) business meetings per year
- Voice/Voting Rights at Grand Chapter Business



HOW TO FORM AN ALUMNI CHAPTER

Staying in close contact with the National Staff is recommended as you go through this process. They will be able to help you identify any issues with your petition well in advance of it being submitted to National Council for consideration. Below you will find the steps needed to petition for Alumni Chapter Status.

STEP ONE: Contact the Director of Alumni Relations at alumnirelations@phisigmapi.org to request contact information for all Alumni located within your area. The proposed Chapter center (i.e. metropolitan area like DC or New York City) should be located in a sustainable area, which is defined as a location meeting the following criteria:

- Not within sixty (60) miles of a pre-existing Alumni Chapter
- Not encompassing an area with a radius of more than thirty (30) miles
- Encompassing an area that has a minimum of twenty (20) known Alumni

The Alumni Chapter should choose a name derived from their geographical Region. If the Regional Alumni Organization is located near a city, then the name of that city should be incorporated within its official name.

STEP TWO: Once a geographic center is determined, your next step will be to gauge interest. Work with the Director of Alumni Relations to contact all of the known Alumni in this area. Initial recruitment is most effectively managed electronically– by email or through a social networking site, like Facebook.

STEP THREE: If more than five (5) people express interest, the interested Alumni should organize an interest meeting (“meet and greet”), and recruit area Alumni to attend. This group will be known as the “Interest Group.”

Meet and Greet’s can be as simple as a happy hour or more involved like a backyard barbeque. Regardless of what form your activity takes, take into consideration the ages and interests of your local Alumni. This should help inform your plans.

STEP FOUR: Once you have at least five (5) people committed to forming an Alumni Chapter, submit recognition paperwork to the National Office to formally begin the recognition process. If approved, your Interest Group will become an Alumni Association. The goal is to transition to Chapter status after a minimum of three months, but no longer than 12 months.

STEP FIVE: During your period as an Alumni Association, your group should focus on building the necessary infrastructure to ensure the sustainability of the prospective Chapter. The National Office recommends focusing on the following core elements:

- **Recruitment.** Although only 10 Alumni Members are required for petitioning to become Alumni Chapter, our strongest Alumni Chapters have a significantly larger pool of engaged Alumni participating in their activities. Hold events to help build interest and support for a local Alumni Chapter. These events can be focused on one or more legs of the Tripod much in the same way events at a collegiate level encompass ideals of scholarship, leadership and fellowship. The



National Staff is an excellent resource for ideas on ways to recruit through unique events.

- **Organizational Structure.** Alumni Associations are required to develop and submit proposed Chapter Bylaws to the National Council along with a completed copy of the Alumni Organization Petition in order to be considered for recognition as an Alumni Chapter. As your group begins to take shape, it is important for prospective Chapter Members to help define the Chapter's bylaws.
- **Leadership Identification.** Alumni Associations are required to elect a President, plus two additional Officers prior to petitioning the National Council. These Officers will serve as the Alumni Chapter Officers required by the National Constitution.
- **NAA Membership.** Each petitioning Member must be a Member of the National Alumni Association. Otherwise the organization will not be recognized as an Alumni Chapter.

The Association Period should last no longer than 12 months.

STEP SIX:

Once the above requirements are met, the Alumni Association is encouraged to petition to the National Council for official recognition as an Alumni Chapter. If the group cannot meet the necessary requirements, you should continue to develop until all requirements are met.

As stated above, Alumni Associations may take up to 12 months to apply for Chapter status with the National Council. If they fail to do so, the Association will be dissolved, unless the National Council approves an extension submitted in writing by the Alumni Association.

It is important to note that the National Council will need time to review petitions for Alumni Chapter status. As outlined in the Alumni Development and Expansion Plan, please allow up to 30 calendar days for the National Council to make their decision.



THE ROLE OF THE ALUMNI CHAPTER

- ❖ Alumni Chapters work with local Collegiate Chapters to understand how they can aid their development.
- ❖ Alumni Chapters work with Collegiate Chapter Alumni Chairs to:
 - Develop Alumni friendly events
 - Provide advice on how to keep their Alumni involved with the Chapter
 - Provide information on the NAA
 - Help establish communication methods with their Alumni
- ❖ Alumni Chapters help promote the concept of a lifetime commitment to Phi Sigma Pi by participating in recruitment and initiate activities such as:
 - Initiate pen pal programs
 - Pinning and Induction
- ❖ Alumni Chapters participate in Collegiate Chapter events, when invited by the Collegiate Chapter, such as:
 - Meetings
 - Regional activities
 - Banquets
- ❖ Alumni Chapters provide assistance to undergraduate Members to attend events outside of their Collegiate Chapter.
- ❖ Alumni Chapters provide professional assistance when applicable.
- ❖ Alumni Chapters develop potential candidates to serve as Alumni Advisors to local Collegiate Chapters.
- ❖ Alumni Chapters participate in the development of their local Region by selecting a Regional Delegate and participating in planning for their Regional Conference.
- ❖ Each Alumni Chapter should actively recruit new Members through a variety of communications, event planning and outreach.
- ❖ Here are some suggested activities that Alumni Chapters and their Members may wish to undertake to support Collegiate Chapters. This list is by no means complete or exclusive.
 - Participate in recruitment and Initiation
 - Start a scholarship fund
 - Help the Alumni Advisor and Chapter Advisor
 - Offer to be a speaker
 - Encourage senior level undergraduates to join the Alumni Organization
 - Offer to write letters of recommendation
 - Donate registration fees for National Events
 - Host a pizza party
 - Advise of job opportunities
 - Write a letter of encouragement



SAMPLE BYLAWS

Article I – Name

The name of this organization shall be _____ Chapter (hereafter referred to as “_____”).

Article II – Purpose

The responsibilities of _____ are: to serve as a service, scholastic, fund-raising, and social outlet for Phi Sigma Pi Alumni; to encourage Alumni to remain involved with Phi Sigma Pi; to serve as a resource to Collegiate Chapters; to provide advice and assistance to the Collegiate Chapters; to recruit new Alumni Chapter Members; to cultivate potential National Council Members; to maintain regular contact with the National Office; to assist the National Office where needed; and to uphold the ideals of this Fraternity as stated in the National Constitution.

Article III – Membership

Section I

An active Alumni Chapter Member shall be defined as one who lives in the _____ area, has left or graduated from their sheltering institution of their Collegiate Chapter in good standing, attends at least one _____ event within the past year (twelve month rolling time frame) and is receiving _____ communications.

Section II

Honorary Members shall be individuals who are ineligible to become Active Members of Phi Sigma Pi but who have demonstrated the highest qualities exemplified by Phi Sigma Pi through outstanding service to the Fraternity or for their community. Honorary Members have been elected into Phi Sigma Pi by the Collegiate Chapter or the National Council or as deemed recognizable by _____, are not required to participate in an Initiation Program, and shall not obtain the status of Active Membership.

Section III

Only active Alumni Chapter Members shall be able to vote or hold office.

Section IV

Grand Chapter Delegates shall be approved by Chapter consent. The Delegates shall meet all requirements set forth in the National Constitution.

Article IV – Executive Board

Section I

The Executive Board shall consist of the following positions: President, Secretary, Recruitment Coordinator, Communications Coordinator, Social Coordinator, and Service Coordinator. At the current board’s discretion, a past Executive Board Member may serve as a de facto Member of the board.

Section II

Responsibilities of Officers (other than those listed in the National Constitution):

- A. The President shall conduct meetings, establish the agenda, act as Parliamentarian, preside over the Executive Board, correspond with the National Office and the brotherhood at large, oversee the duties of the other Executive Board Officers and be a voting Member of the Executive Board.
- B. The Secretary shall take minutes at Chapter business meetings, present minutes from previous meetings, maintain current Member contact information, complete National and other forms, preside in the absence of the President and be a voting Member of the Executive Board.



- C. The Recruitment Coordinator shall be the primary contact for New Members, be in charge of membership promotional events, acclimate New Members into the Chapter and be a voting Member of the Executive Board.
- D. The Communications Coordinator shall handle all communications between the Executive Board and the Members including maintenance of the blog, listserv, Twitter and Facebook pages and be a voting Member of the Executive Board.
- E. The Social Coordinator shall coordinate social events for the Chapter including happy hours, page and popcorn meetings, and other events, and be a voting Member of the Executive Board.
- F. The Service Coordinator shall coordinate service events for the Chapter and be a voting Member of the Executive Board.

Section III

The Chapter Officers shall be elected for a twelve-month term (as deemed by the chapter) by a simple majority vote of the active Members.

Section IV

Vacancies for the office of President will be filled in a special election. Other Executive Board vacancies will be filled by nomination and approval of the Executive Board until the next election.

Article V – Meetings

The Chapter shall schedule business meetings at a time and place designated by the Executive Board, with a minimum of nine business meetings per year.

Article VI – Awards

A Chapter Service Key may be awarded once a year to a Brother(s) who has performed meritorious service to _____. There shall be 75% approval of the Chapter for a service key to be awarded.

Article VII – Ratification

These Bylaws shall be ratified by a two-thirds majority of the active Alumni Chapter Members.

Article VIII – Amendments

These Bylaws may be amended by a two-thirds majority of the active Alumni Chapter Members. Any amendments must be submitted in writing to the active Alumni membership at least two weeks prior to consideration.



PHI SIGMA PI NATIONAL HONOR FRATERNITY
ALUMNI CHAPTER PETITION

The following Phi Sigma Pi Alumni Association Members hereby petition to establish an official Phi Sigma Pi Alumni Chapter in the following geographic center: _____,
Please List City Center/Region

which will be henceforth be known as the _____.
Please list Requested Alumni Chapter Name

We, the undersigned, acknowledge the requirements of an Alumni Chapter of Phi Sigma Pi and fully support the creation of said Alumni Chapter.

Chapter Officials

The following individuals have been elected as Officers of the aforementioned Alumni Chapter:

Chapter President

Name: _____

Address: _____
City | State | Zip

Email Address: _____ Phone: _____

Other Elected Officer

Name: _____

Address: _____
City | State | Zip

Email Address: _____ Phone: _____

Position/Title: _____

Other Elected Officer

Name: _____

Address: _____
City | State | Zip

Email Address: _____ Phone: _____

Position/Title: _____

Please ensure that a copy of your proposed bylaws is attached.



ADDITIONAL RESOURCES

Phi Sigma Pi National Constitution – Article X: Alumni Organizations:

http://wiki.phisigmapi.org/pspwiki/index.php?title=National_Constitution_Article_X

Form 530:

<http://www.phisigmapi.org/Form530AlumniOrganizationEndofYearReport/tabid/5369/Default.aspx>