

# ALUMNI AND VOLUNTEER CORPORATION QUALITY CHECKLIST

## LOCAL VOLUNTEER SUPPORT

Many successful alumni programs over time have included three common elements: An *alumni and volunteer corporation* that is responsible for the financial management of housing (if applicable) and volunteer work with the undergraduate chapter; an *alumni association* that cultivates friendships with alumni by planning alumni events, conducting an annual membership drive, and producing regular newsletters; and an *endowment fund* where gifts and donations can be made for the benefit of the chapter's scholarship, housing, and leadership needs.

While the size, scope, terminology, and formal organization of these activities varies widely from chapter to chapter, the core functions remain consistent. This checklist is meant to be comprehensive. Please note that some functions currently being performed by the alumni and volunteer corporation may appear in the *association* or *foundation* section of the checklist. Use this as a tool to evaluate your chapter's volunteer activities.

Please complete the checklist annually and return it to the Sigma Phi Epsilon Alumni Association at Zollinger House, P.O. Box 1901, Richmond, Virginia 23218, or fax your response to (804) 359-8160.

**Corporate Information**

**Corporation:**

Chapter: \_\_\_\_\_ College/University: \_\_\_\_\_

Corporation Name: (Full Name) \_\_\_\_\_

Corporation Address: \_\_\_\_\_

Tax Identification #: \_\_\_\_\_

Corporation President: (Full Name) \_\_\_\_\_

Corporation Secretary: (Full Name) \_\_\_\_\_

Please indicate IRS designation: (i.e. 501(c)7) \_\_\_\_\_

If the house-holding corporation is separately incorporated from any other alumni entities, please list and include the primary function of each.

**Other Alumni Organizations (if applicable)**

Function: \_\_\_\_\_

Corporation Name: (Full Name) \_\_\_\_\_

Corporation Address: \_\_\_\_\_

Tax Identification #: \_\_\_\_\_

Corporation President: (Full Name) \_\_\_\_\_

Corporation Secretary: (Full Name) \_\_\_\_\_

Please indicate IRS designation: (i.e. 501(c)7) \_\_\_\_\_

**Corporation Organization**

Who are the members of the corporation(s)? (i.e. All chapter alumni) \_\_\_\_\_

\_\_\_\_\_

Who are the officers of the corporation(s)? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Which officers are elected to the corporation(s)? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How are officers elected to the corporation(s)? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Does the corporation(s) hold annual elections? If so, when? \_\_\_\_\_

\_\_\_\_\_

Are elections conducted at an annual meeting? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How are members of the corporation informed of elections? \_\_\_\_\_

\_\_\_\_\_

## **GENERAL OPERATIONS**

- The board meets monthly and at the chapter facility if applicable.
- Has an alumni and volunteer corporation president.
- Has an alumni and volunteer corporation vice president of financial operations.
- Has an alumni and volunteer corporation vice president of relations.
- The chapter counselor is an active part of the alumni and volunteer corporation as an ex-officio member.
- Has a volunteer trained as a Balanced Man Program steward.
- Alumni and volunteer corporation has yearly goal-setting retreat.
- Alumni and volunteer corporation has a five-year strategic plan.

## **SCHOLARSHIP**

- Encourages the chapter to perform above the all-campus average.
- Checks to see that the chapter is conducting the Balanced Man Scholarship with home interviews.
- Coordinates the placement of a resident scholar or housemother where applicable.

## **FINANCIAL OPERATIONS**

- Saves 5% of alumni and volunteer corporation revenue annually or saves 3% of property value for an alumni and volunteer corporation with a facility.
- Encourages the chapter to save 5% of revenue annually.
- Increases fees annually to keep pace with inflation.
- Develops an annual budget and ensures the undergraduate chapter does the same.
- Mails monthly mortgage payment if applicable.
- Monitors housing fees to see that they are above or consistent with residence halls.
- Files Form 990 with the IRS annually.
- Reviews Exhibit I, accounts receivable, financial performance, occupancy rates, and manpower performance at each board meeting.
- Has a signed lease between the undergraduate chapter and alumni and volunteer corporation.

## **VOLUNTEER SUPPORT**

- Produces a newsletter three times a year with an address maintenance system.
- At least two members must attend the Conclave and the Carlson Leadership Academy.
- Sees that the chapter has a faculty advisor.

## **RESPONSIBLE PROGRAMMING**

- Advises the chapter on the Balanced Man Program. Implementation can only occur when the chapter affirms with an 80% vote.
- Has members sign membership agreements each year. This includes newly recruited members.
- Advises the chapter to reach 90% on the Balanced Man Proficiency Evaluation.
- Conducts an annual safety audit of the chapter and facility where applicable.
- Encourages chapter to conduct a semi-annual risk management education session with a knowledgeable attorney or other qualified person, covering the “Statement on Chapter & Individual Responsibility and crisis management procedures.

## **CHAPTER HOUSING (IF APPLICABLE)**

- Sees that 3% of property value is saved each year.
- Property must be adequately insured. It is recommended that property insurance cover replacement cost as opposed to actual value. (Liability insurance is provided for alumni and volunteer corporation officers, chapter counselors, and all undergraduates by the Fraternity’s general liability policy.)
- Works to make sure or sees that property operates at 100% occupancy.
- Makes sure leases are signed each year.
- Makes sure all residents of the chapter house are members who have signed a lease agreement. Friends of members cannot live in the chapter house.
- Collects security deposits each year.
- Collects rent up front, in full, at the beginning of each term.
- Makes sure the facility is wired into the university computer network.
- Conducts property safety walk-throughs twice a year, in addition to implementing the life safety assessment for Sigma Phi Epsilon Headquarters.

***Alumni Association Activities***

- Has a volunteer been selected to organize alumni events.  
Name: \_\_\_\_\_
- Has a volunteer been selected to coordinate an alumni newsletter three times a year.  
Name: \_\_\_\_\_
- Has a volunteer been selected to coordinate alumni recruitment.  
Name: \_\_\_\_\_
- Has a volunteer been selected to organize an annual giving campaign.  
Name: \_\_\_\_\_
- Has planning meetings for activities, newsletters, membership campaign, etc., quarterly.
- Has a database maintained and updated twice a year.
- Updates of chapter's alumni database is sent to Headquarters twice a year.
- Has alumni events \_\_\_ one time, \_\_\_ two times, \_\_\_ three times, \_\_\_ other, annually.  
Name of event: \_\_\_\_\_  
Name of event: \_\_\_\_\_  
Name of event: \_\_\_\_\_  
Name of event: \_\_\_\_\_
- Has a newsletter published \_\_\_ one time, \_\_\_ two times, \_\_\_ three times, \_\_\_ other, annually.  
Name of newsletter: \_\_\_\_\_
- Has a calendar of events sent to all chapter alumni.
- Conducts a senior recognition ceremony with chapter at least once a year.
- Uses the Hoop of Steel Ceremony to welcome graduating seniors to alumni ranks.
- Alumni offered Balanced Man Program education with a trained volunteer once a year.
- Alumni participate in annual service project with undergraduates.
- Alumni sponsor annual mentoring and networking workshop with undergraduates.

***Endowment Fund***

- Implements a plan to develop the chapter's scholarship fund.
- Has an annual endowment for the chapter's Balanced Man Scholarship.  
Total annual scholarships: \$\_\_\_\_\_
- Sponsor undergraduate scholarships annually.  
Total annual scholarships: \$\_\_\_\_\_
- Sponsors undergraduates and volunteers to attend Grand Chapter Conclave.  
How many of each?\_\_\_\_\_
- Sponsors undergraduates and volunteers to attend Carlson Leadership Academy.  
How many of each?\_\_\_\_\_
- Alumni encouraged to make gifts and donations to the Sigma Phi Epsilon Educational Foundation's annual Unrestricted giving campaign.
- Deposits gifts and donations with the Sigma Phi Epsilon Educational Foundation in the chapter-specific endowment fund.
- Deposits gifts and donations with another financial institution.  
Name of institution:\_\_\_\_\_
- Approximate balance:\_\_\_\_\_
- Tax deductible status:\_\_\_\_\_
- Conducts an annual giving campaign to all alumni for scholarships or housing.