

STARTING AN ALUMNI AND VOLUNTEERS CORPORATION

All new chapters must recruit an alumni/volunteer board before they are chartered. The process to form a new alumni and volunteer corporation can be an easy process. Here are some helpful ideas.

RECRUITING PEOPLE

- Form a search committee.
- Prepare a list of prospective members. Headquarters can identify a list of members in a certain zip code range.
- Send an informative letter to prospective members announcing the need for help and the time and place of the first meeting.
- Inquire among university officials to see if they have any suggestions for possible board members.

FIRST MEETING AGENDA ITEMS

- Contact District Governor to see if he is available to facilitate the first group meeting.
- Review role of alumni and volunteer corporation members.
- Review areas of responsibility.
- Nominate and elect officers.
- Establish a few immediate goals.
- Set the time and place of the next meeting.
- Follow up with written minutes and assignments of responsibilities to all in attendance.

INCORPORATION OF THE ALUMNI AND VOLUNTEER CORPORATION

- This is a requirement of all alumni and volunteer corporations.
- Call the Secretary of State for information on how to incorporate. Details vary by state.
- Incorporate as a 501(c)(7) not-for-profit organization.
- Use Sigma Phi Epsilon bylaws. Samples are available from Headquarters and on the website, www.sigep.org.

Headquarters is available to aid in all processes required of alumni and volunteer corporations.

HOW TO INCORPORATE THE ALUMNI AND VOLUNTEER CORPORATION

The first step in incorporating an alumni and volunteer corporation is to contact the Office of the Secretary of State and request a charter for a non-profit corporation. This office will provide you with the information on its requirements for incorporation (these requirements may vary widely from state to state). One requirement will be the need of an attorney (hopefully one will be an alumni and volunteer corporation member) to help prepare the incorporation papers, and in many states, there is a nominal fee required.

The proper name for an alumni and volunteer corporation should be:

“The _____ (Alabama Alpha) _____ Alumni and Volunteer Corporation of Sigma Phi Epsilon”

ALUMNI AND VOLUNTEER CORPORATION MEMBERSHIP

The officers of the alumni and volunteer corporation include the president, vice president of relations, vice president of financial operations, and secretary. The chapter counselor should also be a member of the alumni and volunteer corporation with the responsibility of acting as liaison between the board and the undergraduate chapter. In addition, the board should have a number of directors.

The most successful boards have members that bring with them an expertise in an area of value to board operations. Listed below are member profiles of value to an alumni and volunteer corporation and officer responsibilities:

- A senior management professional as alumni and volunteer corporation president or vice president of relations.
- A corporate controller or certified public accountant as vice president of financial operations.
- An attorney to act as pro bono legal counsel to the alumni and volunteer corporation.
- A real estate professional with knowledge of the area housing market.
- A commercial construction executive or contractor to be responsible for chapter house construction, renovation, and maintenance.

For more information, see “Basics of Your Corporation.”

SAMPLE ALUMNI AND VOLUNTEER CORPORATION MEETING AGENDA

Alumni and volunteer corporation meetings should last no longer than one hour to respect volunteers' time. Socializing can be done before and after the planned meeting for those who have time available.

I. OPENING OF MEETING

Roll call

Reading and approval of minutes from last meeting

(Minutes of the meeting should be sent to each board member, the undergraduate officers, the district governor, and the regional director.)

II. ALUMNI OFFICER REPORTS

President — Report on any issues relevant to the board, along with communications with alumni, the university, and Headquarters.

Vice president of financial operations — Report on the budget and also review the undergraduate budget, accounts receivable, and facility issues.

Vice president of relations — Report on the alumni newsletter, communications, planning for upcoming alumni events, and fund raising.

Chapter counselor — Report on his perspective regarding the current status of the chapter and any upcoming events.

Faculty advisor — Report on pertinent information dealing with university and undergraduate status.

Additional advisor reports:

Resident scholar

Recruitment advisor

Balanced Man Scholarship advisor

Balanced Man Program steward

III. UNDERGRADUATE OFFICER REPORTS

President

Vice president of programming

Vice president of finance

Vice president of member development

Vice president of recruitment

Vice president of communications

Chaplain

- IV. OLD BUSINESS**
- V. NEW BUSINESS**
- VI. REVIEW OF NEXT 90 DAYS (SEE OPERATING CALENDAR)**
- VII. CONFIRM NEXT MEETING**
- VIII. ADJOURNMENT**

UNDERGRADUATES AT ALUMNI AND VOLUNTEER CORPORATION MEETINGS

Alumni and volunteer corporations function most effectively when volunteers are thoroughly informed about chapter operations. Accordingly, written reports by chapter officers are essential components of good alumni and volunteer corporation meetings. The following officers should attend alumni and volunteer corporation meetings and address the listed topics:

CHAPTER PRESIDENT

- Current chapter manpower, broken down by year
- IFC and university relations—recent incidents, new policies
- Recent chapter or individual awards
- Current chapter goals and progress

VICE PRESIDENT OF PROGRAMMING

- Calendar of events
- Intramural rankings
- Recent philanthropic events

VICE PRESIDENT OF FINANCE

- Occupancy level of chapter facility
- Review Exhibit I thoroughly
- Checking and savings account balanced
- List of accounts receivable
- Suspension and expulsion for indebtedness
- Condition of chapter facility—repairs, cleanliness, etc.

VICE PRESIDENT OF RECRUITMENT

- Recruitment goals and dates
- Information on recent recruitment activities
- Balanced Man Scholarship update
- Upcoming recruitment events
- Chapter newsletter update—mailing date, information needed, etc.

VICE PRESIDENT OF MEMBER DEVELOPMENT

- Sound mind, sound body programming update
- Chapter academic standings
- Members not in good standing academically
- Academic awards or scholarships
- Upcoming educational speakers
- New member activities

VICE PRESIDENT OF COMMUNICATIONS

- Newsletter updates
- Web site updates

CHAPLAIN

- Dates of Ritual ceremonies
- Recent standards committee decisions

ALUMNI AND VOLUNTEER CORPORATION MEETING TIPS

Efficient alumni and volunteer corporation meetings are a sure way to improve operations. While meetings may serve a social need, they are primarily designed to disseminate information regarding the alumni and volunteer corporation's operations. Make them work! To ensure a properly functioning meeting that produces results, the following standards are necessary:

REGULARITY

Alumni and volunteer corporations should meet monthly; a group cannot be effective with less regular meetings.

ATTENDANCE

This should be required of all members. Exceptions should be limited to professional obligations or illness; almost all other excuses are just that...excuses. Remember: Even Uncle Billy was fined 50¢ in 1903 for missing a chapter meeting, and although members are volunteering, they have made a commitment to fulfill certain expectations. Meeting attendance is a basic expectation.

FORMAL MEETING

All meetings should be held at the chapter facility (if applicable) or another appropriate location on campus. Undergraduate officers should be included in the meeting. Bars and restaurants are not appropriate locations and are a poor role model for undergraduates. If you wish, adjourn to one of these locations after the work of the meeting is complete. Meeting in the facility is one of the few ways for the entire alumni and volunteer corporation to regularly inspect the facility.

RULES OF ORDER

All members of the alumni and volunteer corporation should have a thorough knowledge of parliamentary procedures. If this goal is achieved, a few simple rules of parliamentary procedure can be used, and the meetings will become more constructive. At the same time, the members may be motivated to take a more active part in the affairs and operations of the alumni and volunteer corporation.

COMMUNICATION TIPS

- White Marking Board** — Many chapters purchase a white board (or chalk board) to permanently fix to the chapter room wall. The agenda, action areas, and major points are noted so all may see.
- Executive Committee** — The executive committee must work to make alumni and volunteer corporation meetings run quickly and smoothly, conveying information and actions as necessary.
- Scheduling** — Set a consistent time and day of the month for all meetings. This enables members to plan far in advance for meeting attendance.
- Set-up** — Ensure the meeting facility can comfortably accommodate the entire alumni and volunteer corporation. Can each person be seated around the same table, or does the environment distract from business and limit participation?

ALUMNI AND VOLUNTEER CORPORATION RETREATS

Retreats are essential for alumni and volunteer corporations to ensure the organization is always moving forward. By holding retreats, your alumni and volunteer corporation will be heading down the road to success.

- Planning Retreat** — Provides the officers an opportunity to develop alumni and volunteer corporation goals and policies to achieve measured improvement in all areas of operation and to achieve cohesiveness and identity. This retreat should occur each term.
- Officer Transition Retreat** — Outgoing officers transfer ideas, knowledge, and materials, and offer advice to incoming officers. This retreat should occur within two weeks of the elections.

PLANNING A RETREAT

A retreat should be held in order to develop goals and action steps to provide the alumni and volunteer corporation with a focus for the upcoming year and also to provide an opportunity for members to bond.

The following are helpful hints for a successful retreat:

- Choose a good facilitator, someone outside the alumni and volunteer corporation is preferable. If this is not an option, the following individuals are good choices:
 - Chapter counselor
 - Greek life professional
 - Faculty member from the communication, psychology, or business department
 - Local alumnus
 - Regional director
 - District governor
- Be sure to reserve the retreat location well in advance. Do not use the chapter facility. Some ideas for retreat locals include:
 - Hotels and conference centers
 - Local office buildings with conference rooms
 - Local lodges
 - Community centers
 - Campus buildings
- Notify the facilitator well in advance and provide an agenda.
- Give advance notice so everyone can plan accordingly (at least three weeks).
- Ensure 100% attendance.
- Be sure to have supplies such as pencils, paper, flip charts, markers, and masking tape.

- ❑ Have a breakfast with everyone together before the retreat. Plan breaks in the agenda.
- ❑ Poor communication leads to a poor retreat. Ensure everyone is aware of the event.
- ❑ Share the results! Everyone should live the outcomes of the retreat.

GUIDELINES FOR THE FACILITATOR

- ❑ **Planning** — Frequently, the aspect of planning is overlooked before the retreat. There are basic preparations to eliminate such problems:
 - Define the reasons for the retreat (goal setting, strategic planning, information).
 - Involve outside participants (faculty, alumni, professionals, etc.).
 - Establish an outline.
 - Provide for adequate facilities (away from the chapter house is best).
 - Create an interesting program.
 - Outline the meals to minimize distraction from the retreat.
- ❑ **Processing** — Select activities that promote communication and that provide all participants an easy path to participation. Provide a variety of experiences. Be sure to include activities which create new situations, approaches, problems.

There are a number of excellent games/ activities available for your use through Headquarters. Be selective, match activities with goals, and make sure that the desired end can be reached by the selected means.

If you are the retreat facilitator, you must remember certain basic rules:

- Act and look professional.
 - Direct but do not dictate direction.
 - Be prepared for the unexpected.
 - Be excited.
- ❑ **Results** — At the completion of the retreat, let each member be able to clearly define the product of the retreat. All retreats should be planned so that in the end, participants leave with a feeling of accomplishment. Not all retreats will produce something written, but if there are not written results, have a means developed so that the group departs assured of the previously designated result.

OFFICER TRANSITION RETREAT

An officer transition retreat should be held shortly after elections at which alumni and volunteer corporation goals and strategic plans should be discussed and updated.

- Set up a meeting with the old and new executive committee.
- Ask the new executive committee what the old executive committee did well.
- Ask the old executive committee what it could have improved on.
- Together they should come up with a list of areas the chapter needs to improve.
- Ask the old executive committee to leave.
- Do a SWOT analysis with the new executive committee.
- Explain to the new executive committee what a SMART goal is.
- Give the committee members five minutes to come up with three SMART goals of their own. They should already have an idea of what they want to do.
- Help them to make the goals tangible and realistic with an ending date.
- Create three goals the executive committee will do as a group. Have the vice president of communications write them down.
- The goals should be posted and given to the chapter members so they are held accountable to them with an ending date for each.
- Nuts and Bolts (facilitated by District Governor, Headquarters staff person, etc.)
 - Carlsons and Conclave registration
 - Expectations on forms and fees
 - Leases/Membership Agreements
 - Update contact information (undergraduates/volunteers/Headquarters)
 - Complete the Officer Change Form
 - ⇒ This form can be filled out over email and sent to Chad Wester (chad.wester@sigep.net).
 - ⇒ Create a distribution list of all executive committee members to send them information throughout the year. Pass this list to the regional director.
 - Spring/fall billings
 - Risk management
 - Chapter plans
 - Chapter budget
 - National Fraternity (initiatives, resources, etc.)
 - Balanced Man Scholarship
 - Balanced Man Program

SAMPLE ALUMNI AND VOLUNTEER CORPORATION CALENDAR

JUNE

- Conduct annual alumni and volunteer corporation elections.
- Conduct annual alumni and volunteer corporation retreat.
- Conduct audit of chapter and alumni and volunteer corporation finances.
- Determine chapter and alumni and volunteer corporation budgets for coming school year.
- Begin summer maintenance and capital improvements.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy and budget.

JULY

- Finalize chapter and alumni and volunteer corporation budgets for coming school year.
- Continue summer maintenance and capital improvements.
- Mail summer issue of alumni newsletter.
- Summer chapter meeting
- Monitor chapter executive committee plans and calendar for coming year.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Send letter to parents of incoming new members.

AUGUST

- Attend Grand Chapter Conclave (odd-numbered years).
- Leases for new members are signed.
- Membership agreements for new members are signed.
- Open chapter facility.
- Move in chapter facility residents.
- Collect rent from chapter.
- Collect damage deposits from facility residents.
- Pay alumni and volunteer corporation savings first.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Advise chapter to participate in a risk management education program. Review policies and procedures.
- Ensure payments are made in full to SigEp Headquarters to receive 5% refund.
- Walk through chapter facility to inspect damage, maintenance, and safety issues.

SEPTEMBER

- Collect rent from chapter.
- Pay alumni and volunteer corporation savings first.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Conduct recruitment clinic for new members.
- Coordinate annual kick-off chapter retreat.

OCTOBER

- Collect rent from chapter.
- Pay alumni and volunteer corporation savings first.
- Mail fall issue of alumni newsletter.
- Mail address updates to Headquarters.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Walk through chapter facility to inspect damage, maintenance, and safety issues.

NOVEMBER

- Collect rent from chapter.
- Pay alumni and volunteer corporation savings first.
- Host annual homecoming/Founders Day alumni event.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Walk through chapter facility to inspect damage, maintenance, and safety issues.

DECEMBER

- Collect rent from chapter.
- Pay alumni and volunteer corporation savings first.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Walk through chapter facility to inspect damage, maintenance, and safety issues.
- Update chapter and alumni and volunteer corporation budgets for semester/mid-year financial report.
- Conduct chapter executive officer transition retreat.
- Register for Carlson Leadership Academy.
- Move out chapter facility residents.
- Close chapter facility for winter break.

JANUARY

- Open chapter facility.
- Move in chapter facility residents.
- Collect rent from chapter.
- Pay alumni and volunteer corporation savings first.
- Coordinate spring kick-off chapter retreat.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Walk through chapter facility to inspect damage, maintenance, and safety issues.
- Collect applications for alumni and volunteer corporation scholarships.

FEBRUARY

- Attend Carlson Leadership Academies.
- Membership agreements for new members are signed.

- Collect rent from chapter.
- Pay alumni and volunteer corporation savings first.
- Conduct recruitment clinic with chapter.
- Award alumni and volunteer corporation scholarships.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Walk through chapter facility to inspect damage, maintenance, and safety issues.

MARCH

- Collect rent from chapter.
- Pay alumni and volunteer corporation savings first.
- Mail spring issue of alumni newsletter.
- Mail address updates to Headquarters.
- Renew employee contracts or hire as necessary.
- Collect signed leases from returning members.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Walk through chapter facility to inspect damage, maintenance, and safety issues.
- Register for Grand Chapter Conclave (odd-numbered years).

APRIL

- Collect rent from chapter.
- Pay alumni and volunteer corporation savings first.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Walk through chapter facility to inspect damage, maintenance, and safety issues.

MAY

- Collect rent from chapter.
- Pay alumni and volunteer corporation savings first.
- Host banquet/reception for graduating seniors.
- Conduct Hoop of Steel Ceremony.
- Host annual spring alumni event.
- Monitor recruitment, Balanced Man Scholarship, Balanced Man Program, academics, occupancy, and budget.
- Walk through chapter facility to inspect damage, maintenance, and safety issues.
- Move out chapter facility residents.
- Complete inventory of chapter property, including kitchen items, furniture, etc.
- Return damage deposits to graduating/non-returning members.
- Close chapter facility for summer break.