



# CHI PHI ALUMNI GROUPS

## September 2007 Health and Operational Summary

Customized for the Delta Pi Alumni Association

CHI PHI  
Authentic



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# The State of Our Alumni Network: September 2007

For right or for wrong, the past decade and a half have been almost entirely focused on undergraduate Chapter and Colony development. For most of that time, the vast majority (75%-90%) of our budget has been directed toward the development and growth of our undergraduate groups. Our staff size and positions have reflected (and even reinforced) this focus. But the question for Chi Phi is (or should be), why would any membership-driven organization focus the vast majority of its budget on 7% of its membership while virtually ignoring the other 93%?

It is true that there have been a small handful of volunteers and staff members who have carried the flag of alumni development<sup>1</sup> and volunteer cultivation throughout that period. But on an overall, cultural, level our alumni have been relegated to second-class citizenship for far too long.

As a result, our Alumni organizations and network are dangerously weak. Our Chapters are in desperate need of advisors. Many of our alumni groups meet infrequently at best and are run by only a handful of thinly-stretched volunteers. The number of active metropolitan Chi Phi Clubs has dwindled to a fraction of what it was just a few decades ago. Even our system of cultivating future national leaders is alarmingly weak. In short, our “bench strength” is unacceptably small.

I'm pleased to report however that the tide is turning and that increased resources, manpower and support for alumni development have been and will continue to be so allocated. With last year's transfer of all fundraising duties to the Chi Phi Educational Trust, a move which made every gift solicited by Chi Phi a tax-deductible one, a move that numerous fundraising consultants have repeatedly requested, and a move that brought us in line with nearly every other inter/national fraternity and sorority, the portion of our Fraternity's budget which had previously been dedicated to alumni fundraising is now focused entirely on alumni development. Further, the time, travel, and workload of senior staff leadership is also focused on this long-neglected area of Chi Phi.

And so the long road to redeveloping our alumni network begins. The bad news is that our Fraternity has quite a ways to go. The good news is our weaknesses are in the details, meaning that the infrastructure is in place.

## Understanding What's Out There

When a well respected national officer commented that we “have no idea what alumni organizations are out there” he couldn't have been more correct. Exactly how many active alumni associations does Chi Phi have? What exactly constitutes “active”? How many House Corporations are out there? What does “active” mean for them? Do they need to have certain officers? Do they need to meet a certain number of times per year? What about metropolitan Chi Phi Clubs? How many Chapters have Advisory Boards? How many are scraping by with one, over-taxed, over-worked, and under-appreciated key alumnus? The truth is that for decades Chi Phi has been relying on 18-22 year old Chapter Gammas to tell us which alumni are involved instead of going directly to source. Instead of viewing our alumni entities as stand-alone groups, we've seen and treated them as a subset of our Chapters. No wonder their health has waned.

Before any macro-level alumni development strategy could be developed we needed to gain a general idea of where our groups were. Thus, we began a two-month process of finding out exactly what was “out there”. Many who have participated in one of our undergraduate Chapter Consultations during the 2006-07 and 2007-08 academic years have noticed that we have begun to use internet-based survey software to conduct our “due-diligence” prior to arriving on site. That has been the same method employed here. From July 31 through September 1, we reached out to individual alumni from 80 different Alumni Associations around the country and asked them to answer 23 brief questions about their Alumni Associations, House Corporations, and Chapter Advisors. About 80% of our associations responded. The following pages highlight what they told us.

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<sup>1</sup> Unless noted otherwise, the term “development” refers to the systematic development of groups, not fundraising.

# THE DIFFERENT TYPES OF CHI PHI ALUMNI GROUPS

There are three distinct types of Chi Phi alumni groups: Chapter Alumni Associations, metropolitan Chi Phi Clubs, and House Corporations. Hybrid forms of these organizations have also developed around the country.

## Alumni Associations

Alumni Associations exist to provide benefits of membership to alumni – a group that constitutes a full 93% of our members. Their membership is not explicitly restricted to alumni, but it is implied. They have their own bank accounts, hold their own meetings, operate under their own bylaws, and organize their own events. Many alumni associations have integrated the involvement of alumni from other Chapters. They are not restricted to operations within the same zip-code as the undergraduate Chapter with which they are associated (meaning that there may be, for example, regular activity and events for our Berkeley Chapter’s alumni association in Berkeley, but also in Seattle, Sacramento, Portland, San Francisco, Los Angeles, and San Diego).

## House Corporations and Hybrid Alumni Association/House Corporations

Stand alone House Corporations exist to provide housing solutions for undergraduate groups. They do not exist to advise the Chapter or organize alumni events. They are led by a small team of unique volunteers (meaning that the officers of the house corporation are different than those of the alumni association) and governed by their own articles of corporation. They have separate meetings and separate bank accounts. Roughly one third of Chi Phi Chapters have stand-alone House Corporations.

Another third of Chi Phi Chapters have one entity which “fills both roles without over-taxing the alumni leadership”. This is neither right nor wrong, nor is it officially endorsed or opposed by the National Fraternity. Chi Phi’s concern is and should be that both objectives (benefits of membership for alumni as well as housing solutions for the Chapter) are accomplished, not necessarily how each group goes about accomplishing those goals.

## Metropolitan Chi Phi Clubs

A metropolitan Chi Phi Club is a membership-based organization of Chi Phis that exists to bring area Chi Phis (hailing from different colleges and universities) together for social, professional, recreational, and other purposes. They are essentially, city-based, multi-Chapter, alumni associations. Roughly two decades ago, Chi Phi had about two-dozen metropolitan Chi Phi Clubs. Today, we have just two: Washington, DC and Atlanta, GA in addition to development opportunities in New York, Portland (Oregon), and Southern California.

<b>Active Clubs (1987):.....</b>	<b>32</b>
<b>Active Clubs (2007):.....</b>	<b>2</b>

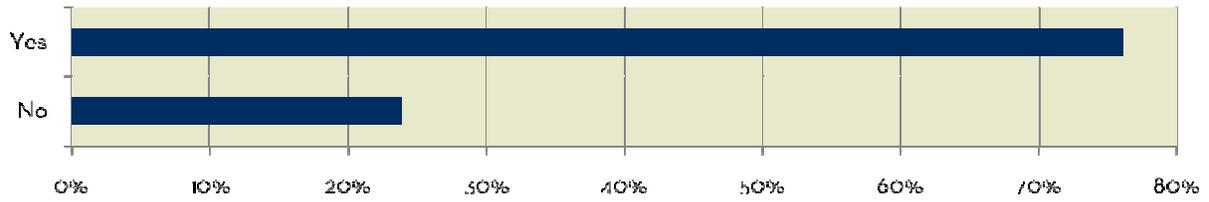
## Other Hybrid Associations

Several other hybrid association types have developed despite the fact that no official classification for them exists in the Chi Phi Constitution. For example, two Chapter Alumni Associations are double-operating as metropolitan Chi Phi Club: the Epsilon Delta Alumni Association / Northwest Chi Phi Club, which changed its name to include the alumni of the Oregon and Washington alumni upon the closure of their Chapters and the Eta Delta Alumni Association / Chi Phi Club of Southern California which is working diligently to build out alumni activity and involvement, bring other area alumni into the fold, and re-establish the Eta Delta Chapter at USC.

Another hybrid developed within the State of Florida: a “state-wide” alumni association which exists to strengthen the network of the many alumni and alumni groups within Florida. Currently no other statewide groups exist

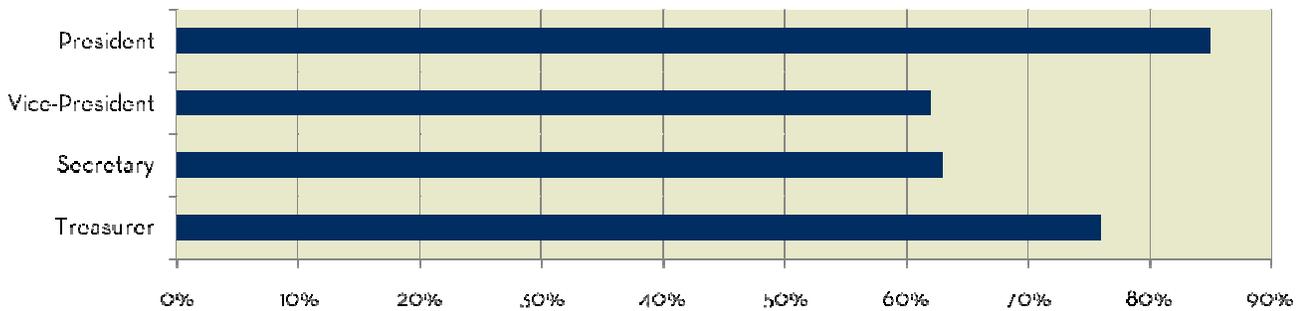
# Nationwide Summary of Association Activity and Operations

## Does your Alumni Association have current bylaws?



What Delta Pi Alumni Association Reported: **Yes**

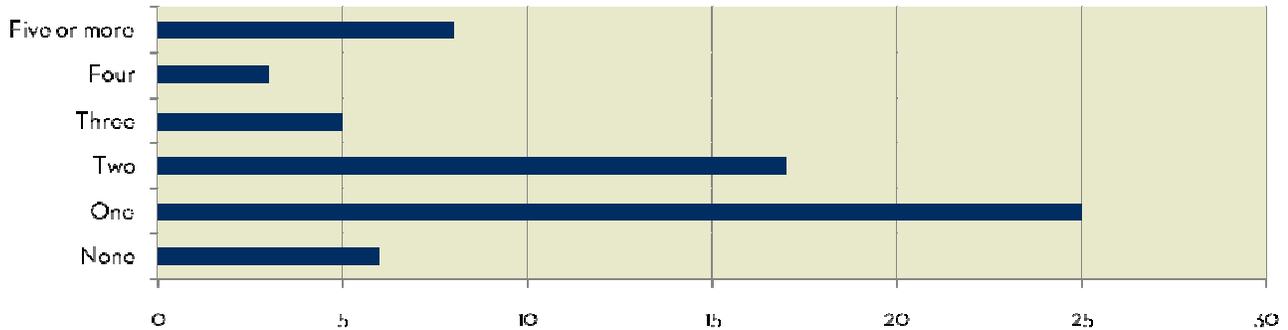
## Which offices are actively filled within your Alumni Association?



What Delta Pi Alumni Association Reported:

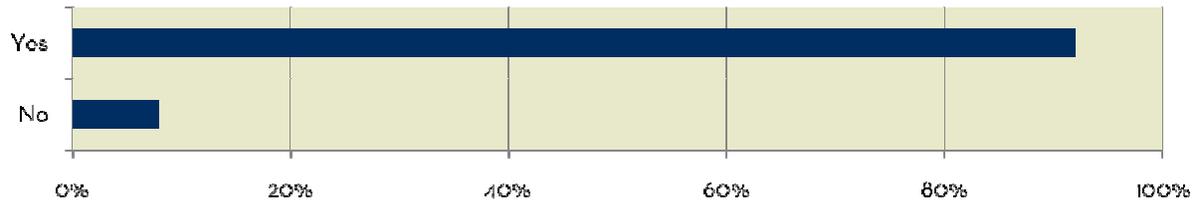
President:	Yes
Vice President:	Yes
Secretary:	Yes
Treasurer:	Yes

## How many non-meeting social activities does your Association hold per year?



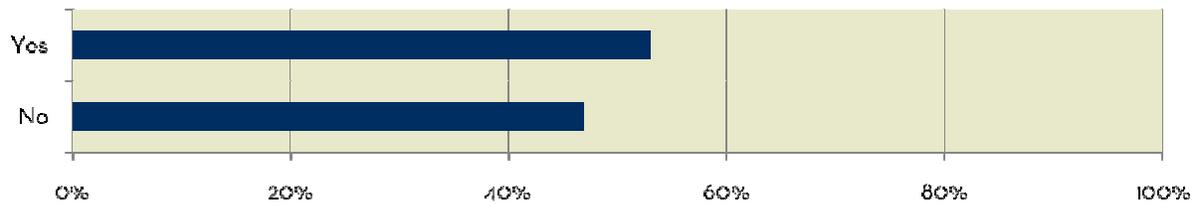
What Delta Pi Alumni Association Reported: **Five or more**

### Does your Alumni Association have an email list?



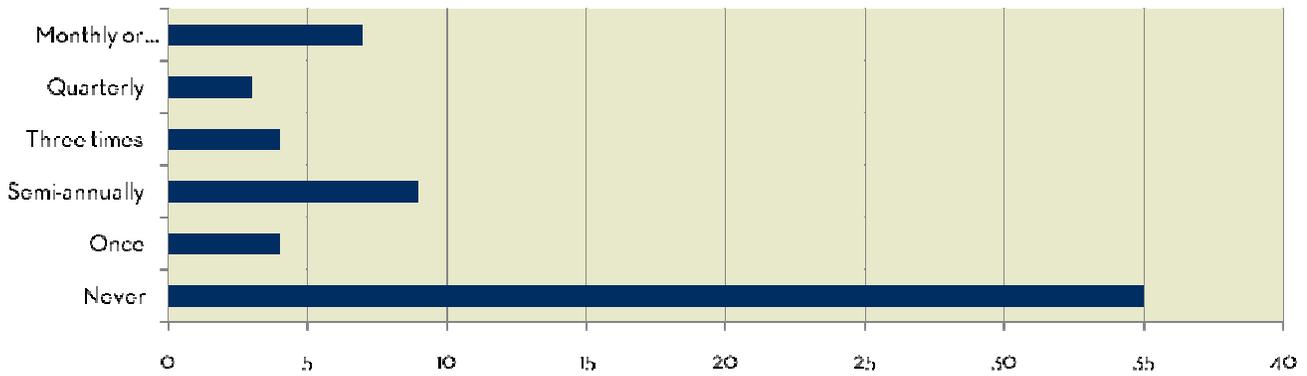
What Delta Pi Alumni Association Reported: **Yes**

### Does your Alumni Association have a current website?



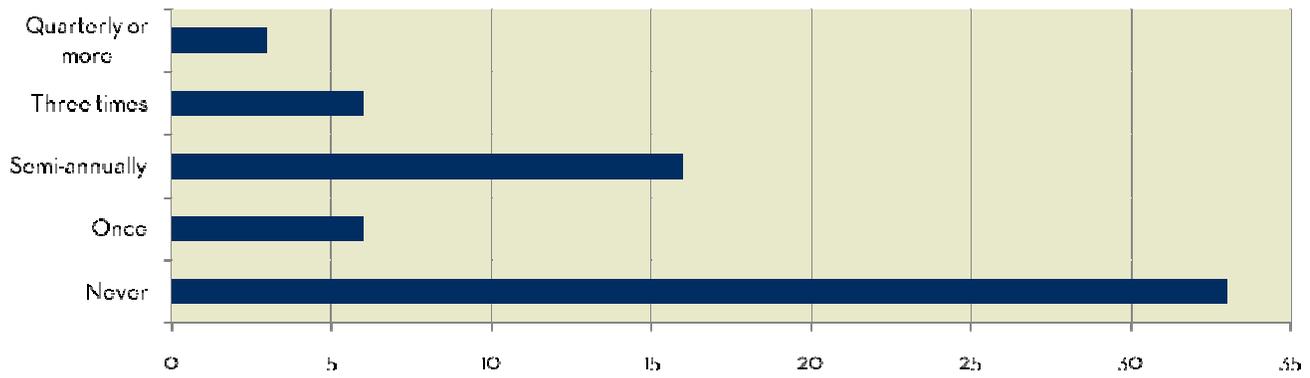
What Delta Pi Alumni Association Reported: **Yes**

### How frequently is your Alumni Association's electronic-newsletter published?



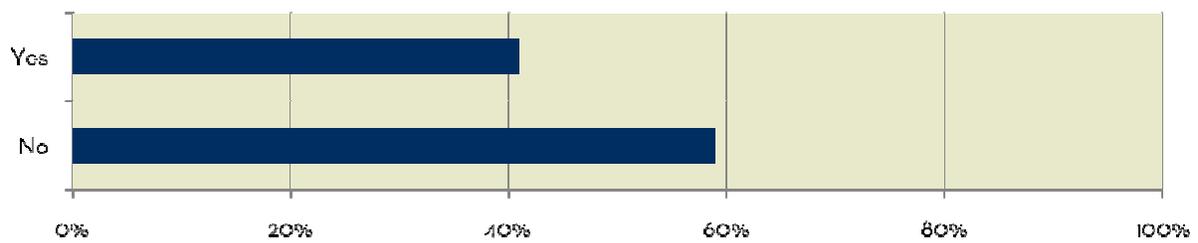
What Delta Pi Alumni Association Reported: **Never**

**How frequently is your Alumni Association's print-newsletter published?**



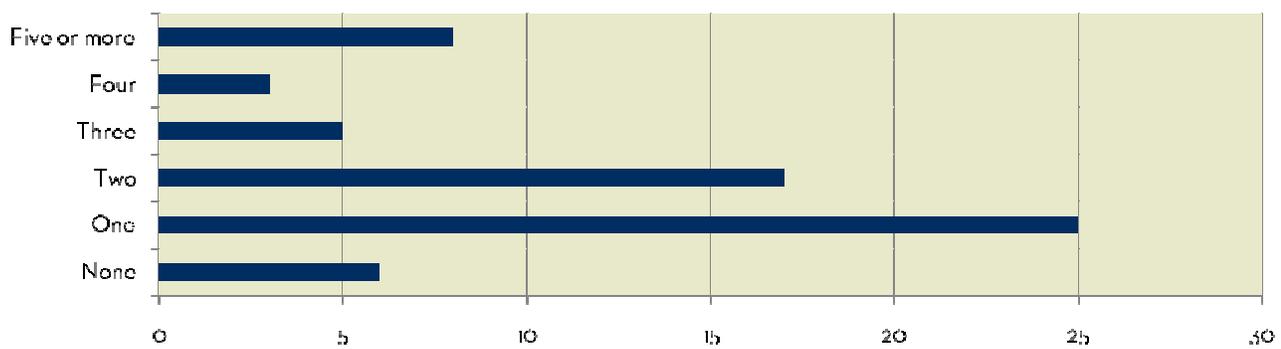
What Delta Pi Alumni Association Reported: **Never**

**Does your Alumni Association have an established dues structure?**



What Delta Pi Alumni Association Reported: **Yes**

**How many meetings does your Alumni Association hold per year?**



What Delta Pi Alumni Association Reported: **Three**

# The Plan for Alumni Development

This academic year has been and will continue to be a period of importance as Chi Phi makes a concerted effort to enhance the overall health and operations of its many alumni groups. Here are a few of the things you can expect as your Fraternity pursues stronger alumni organization health and operations:

## **Outreach directly to Alumni Associations:**

As has already been stated, we are shifting away from viewing our alumni organizations as secondary appendages of our Chapters and toward working with them as stand-alone groups. This four part effort will include association-specific correspondence (such as this report), an annual association registration/update report, alumni-specific assistance, consulting, and programming, and limited access to Chi Phi's member database for each group that completes its annual registration.

## **Increased metropolitan outreach:**

Last spring we kicked off efforts to reach out and meet more of our alumni in major metropolitan areas by hosting seven meet and greet receptions in cities around the country. Although attendance varied from city to city, we did get the opportunity to meet several hundred alumni who we had never heard from before. These events were considered quite a success. This spring we will host eleven such receptions in cities selected to reinforce existing alumni entities, recreate new alumni organizations, and supplement future Fraternity expansion plans. Look forward to receiving information about Chi Phi receptions in Miami, Orlando, Tampa, Philadelphia, Pittsburgh, Minneapolis, Charlotte, Baltimore, Seattle, San Francisco, and Chicago, but more importantly, contact [kuerston@chiphi.org](mailto:kuerston@chiphi.org) if you would be willing to reach out to and personally invite alumni of your chapter as a member of one of an event host committee.

## **Alumni resource development:**

The Fraternity has already revamped its alumni association and Chi Phi Club manuals and created an alumni-specific resource CD. Several of those documents are enclosed with this mailing. As the year goes on and as this effort progresses, further resources will be developed based on the specific requests and needs of individual groups. To learn more or to receive specific assistance contact [kuerston@chiphi.org](mailto:kuerston@chiphi.org).

## **Hands on assistance for Chi Phi Clubs:**

With only two "active" Chi Phi Clubs, Chi Phi has a long way to go as it seeks to rebuild its alumni network. The good news is that three major cities have already been identified for Club development within the 2007-2008 academic year: Portland (Oregon), Los Angeles, and New York. Existing alumni activity and volunteer leadership are already in place. Further, the metropolitan outreach effort is being used to identify the best prospects for 2008-2009 Club development. Our goal is to achieve sustainable growth in Chi Phi's metropolitan Club roster by an average of two Clubs per year.

## **Volunteer recruitment:**

We know that one or two men cannot successfully run an alumni organization but that, in far too many cases, just one or two men are doing their best to keep everything afloat. Throughout the year, in both the Chi Phi Chakett and through individual solicitations, we're going to reach out to help identify and secure the volunteer efforts of additional alumni volunteers for our Alumni Associations, our Chi Phi Clubs, and our Chapters. Our goal is to increase our volunteer pool by 15% by June 2008 and by another 15% by June 2009.

## **Alumni-centered regional workshops:**

Lastly, the Fraternity will experiment with alumni-focused regional workshops this spring. Specifically requested by the Congress, these single-afternoon programs will coincide with our Regional Leadership Alliances. Locations will be selected based on area demand and the programming will be customized in advance based on the specific needs and requests of registered participants.

# BASIC ALUMNI ASSOCIATION EXPECTATIONS<sup>2</sup>

Our Chapters have had the Basic Chapter Expectations for years, but our Alumni Associations haven't traditionally had any objective criteria to guide and assist their leadership in building and strengthening their groups. Thus, the following provisional set of basic operational expectations has been developed:

## Association Operations

- The association shall meet at least twice per year for the purposes of growing, advancing, and developing the association as a stand-alone entity.
- The association's leadership shall meet at least quarterly for the purposes of growing, advancing, and developing the association as a stand-alone entity.
- The association shall organize at least two non-meeting/social activities per year
- The association shall maintain and operate within current documented bylaws.
- The association shall operate within the bounds of the Chi Phi Personal Safety Policy.
- At least half of all dues-paying members participate in at least one alumni association event, meeting, or activity on at least an annual basis.
- The association shall file the Fraternity's Alumni Organization Update at least annually.

## Association Communications

- The association shall have an active website *and* an email list *or* a semi-annual newsletter *or* a quarterly e-newsletter.

## Association Leadership

- The association shall elect all key officers: President, Vice President, Secretary, and Treasurer.
- All offices shall be filled by different members.

## Association Finances

- The association shall maintain a bank account.
- The association shall establish a dues structure of some form.

## Association Size and Membership

- The Association shall have a membership of *either* fifteen (15) dues-paying members *or* fifteen percent (15%) of living alumni are dues-paying members, *whichever is greater*.

## Chapter/Colony Support

- The association shall appoint at least one Alumnus Advisor to serve the Chapter
- The association shall ensure that at least one Chapter Faculty Advisor has been secured.
- The association shall invite a key campus Greek affairs administrator to meet at least annually.

## Housing Support

- Either a separate House Corporation (with a different board of volunteers) exists to pursue housing objectives or a separate board within the Alumni Association (with different officers) oversees all housing matters.

## National Involvement

- The association shall send a voting delegate to the annual Congress of the Fraternity.

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<sup>2</sup> Pending any review, edit, and approval of the 143<sup>rd</sup> Chi Phi Congress in New Orleans, Louisiana, June 2008. Associations are encouraged to review these standards and to take an active role in their development at the next Congress by proposing modifications as they see fit.

# STANDARDS FOR ALUMNI ASSOCIATION EXCELLENCE<sup>3</sup>

## Association Operations

- The association shall meet at least quarterly per year for the purposes of growing, advancing, and developing the association as a stand-alone entity.
- The association's leadership shall meet at least quarterly for the purposes of growing, advancing, and developing the association as a stand-alone entity.
- The association shall organize at least four non-meeting/social activities per year
- The association shall maintain and operate within current documented bylaws.
- The association shall operate within the bounds of the Chi Phi Personal Safety Policy.
- At least half of all dues-paying members participate in at least two alumni association event, meeting, or activity on at least an annual basis.
- The association shall file the Fraternity's Alumni Organization Update at least annually.

## Association Communications

- The association shall have an active website *and* an email list *and* a semi-annual print newsletter *and* a semi-annual e-newsletter.

## Association Leadership

- The association shall elect all key officers: President, Vice President, Secretary, and Treasurer as well as at least three at-large board members.
- All offices shall be filled by different members.

## Association Finances

- The association shall maintain a bank account.
- The association shall maintain six months of operational reserves.
- The association shall establish a dues structure of some form.

## Association Size and Membership

- The Association shall have a membership of *either* fifty (50) dues-paying members *or* thirty-five percent (35%) of living alumni are dues-paying members, *whichever is greater*.

## Chapter/Colony Support

- The association shall appoint at least three Alumnus Advisors to serve the Chapter
- The association shall ensure that at least one Chapter Faculty Advisor has been secured.
- The association shall invite a key campus Greek affairs administrator to meet at least annually.
- The association has established a Chapter Excellence Fund with the Chi Phi Educational Trust or other such chapter-specific scholarship fund and that fund's principal grew by at least 10% over the previous year.

## Housing Support

- Either a separate House Corporation (with a different board of volunteers) exists to pursue housing objectives or a separate board within the Alumni Association (with different officers) oversees all housing matters.
- Operational reserves have been set aside in an amount at least equal to twelve months of all property management costs.

## National Involvement

- The association shall send a voting delegate to the annual Congress of the Fraternity.

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<sup>3</sup> Pending any review, edit, and approval of the 143<sup>rd</sup> Chi Phi Congress in New Orleans, Louisiana, June 2008. Associations are encouraged to review these standards and to take an active role in their development at the next Congress by proposing modifications as they see fit.

# BASIC OPERATIONAL ACTIVITIES FOR METROPOLITAN CHI PHI CLUBS<sup>4</sup>

Just as is the case for Chapters, Colonies, and Alumni Associations, some quantifiable set of minimum operational benchmarks is necessary to define “activity”. The following provisional set of basic operational activities has been developed:

## **Club Operations**

- The Club shall organize at least six social, professional, networking, holiday, or service activities per year.
- The Club shall organize at least two activities per year at which spouses and families are specifically invited.
- The Club shall maintain and operate within current documented bylaws.
- The Club shall operate within the bounds of the Chi Phi Personal Safety Policy.
- The association shall file the Fraternity’s Alumni Organization Update at least annually.

## **Club Communications**

- The Club shall have an active website.
- The Club shall have an active email list.
- Area alumni shall receive at least 30 days notice of any Club activity.
- The Club shall submit regular photographs and updates for publication in the Chi Phi Chakett and the Chi Phi Grapevine.

## **Club Leadership**

- The association shall elect three key officers: President, Secretary, and Treasurer.
- All offices shall be filled by different alumni members.

## **Club Finances**

- The Club shall maintain a bank account.
- The Club shall establish a dues structure of some form.

## **Club Size and Membership**

- The Club shall maintain an active membership of at least thirty (30) dues-paying members.
- The Club shall grow its membership by at least 10% over the previous year.
- The Club shall specifically target the membership of young alumni (those within three years of graduation).

## **National Involvement**

- The Club shall send representation to the annual Congress of the Fraternity.
- The Club is encouraged to establish an annual scholarship dinner or other such fundraiser benefiting the Chi Phi Educational Trust.

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<sup>4</sup> Pending any review, edit, and approval of the 143<sup>rd</sup> Chi Phi Congress in New Orleans, Louisiana, June 2008. Associations are encouraged to review these standards and to take an active role in their development at the next Congress by proposing modifications as they see fit.

