The Five Areas of Focus for Alumni Chapters  
Last Updated: 8/20

The goals of alumni chapters can be broken down into five objectives, the first being Infrastructure, the basic framework that an organization needs in order to maintain sustainably. These required actions must be completed each year in order to remain in good standing. The other four make up the key components of alumni engagement: Information, Interaction, Involvement and Investment.

In order to provide clarity as to the operations of an alumni chapter, there are categories within each of these objectives that are further broken down into specific actions which can be a part of an alumni chapter’s plan. If you have any questions on the specifics of any action, please contact the staff member listed next to the item.

To help alumni chapters prioritize each of these categories and actions, each has been assigned a specific priority level. These priority levels define the expectations of Pi Kappa Phi Fraternity. These four levels are as follows:

<table>
<thead>
<tr>
<th>Required</th>
<th>Meets Expectations</th>
<th>Exceeds Expectations</th>
<th>Excels Beyond Expectations</th>
</tr>
</thead>
</table>

As a general rule, when developing a plan for your alumni chapter, it is important to consider the ‘Required’ and ‘Meets Expectations’ actions the most immediate priority, while the ‘Exceeds Expectations’ and ‘Excels Beyond Expectations’ actions are optional and can be chosen based on the needs and resources of the chapter.

### Infrastructure

<table>
<thead>
<tr>
<th>Category</th>
<th>Level</th>
<th>Action</th>
<th>Expectation</th>
<th>Resources / Webpages</th>
<th>Staff Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liability Coverage &amp; Supreme Chapter Votes</td>
<td>Required</td>
<td>Dues</td>
<td>Annual dues ($100 per chapter) paid to the National Fraternity</td>
<td></td>
<td>Mary-Michael McClure, Coordinator of Alumni Engagement</td>
</tr>
<tr>
<td>Reporting</td>
<td>Required</td>
<td>Annual Survey</td>
<td>Annual Alumni Chapter Survey completed and submitted to National HQ.</td>
<td>Download Annual Alumni Chapter Survey</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Required</td>
<td>Executive Council</td>
<td>Maintains an Executive Council including President and Treasurer.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Governance</td>
<td>Required</td>
<td>Constitution and By-Laws</td>
<td>Has up to date constitution and bylaws on file with the National HQ.</td>
<td>Download Sample Constitution and By Laws</td>
<td></td>
</tr>
<tr>
<td>Legal Status</td>
<td>Meets</td>
<td>Completes the IRS 990</td>
<td>Completes the IRS 990</td>
<td>IRS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Meets</td>
<td>Federal filings</td>
<td>Establish organization as a federal non-profit.</td>
<td>IRS</td>
<td></td>
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</table>
### Information

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<tr>
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<tbody>
<tr>
<td>Communication</td>
<td>Meets</td>
<td>Newsletter</td>
<td>The alumni chapter ensures an electronic or hardcopy newsletter is distributed to chapter alumni at least once annually.</td>
<td>Newsletter Template Guide</td>
<td>Laura Thompson, Assistant Director of Alumni Program Marketing</td>
</tr>
<tr>
<td></td>
<td>Meets</td>
<td>Website / Social Media</td>
<td>The alumni chapter maintains a website and/or social media accounts that chapter alumni can be directed to in order to remain informed.</td>
<td>Brand Guidelines</td>
<td><a href="mailto:communications@pikapp.org">communications@pikapp.org</a>, Communications Team</td>
</tr>
<tr>
<td>Data Integrity</td>
<td>Meets</td>
<td>Data Integrity</td>
<td>Actively collaborates with the National HQ in order to ensure that contact information for chapter alumni are as accurate as possible.</td>
<td>Alumni List Request Form</td>
<td>Mary-Michael McClure, Coordinator of Alumni Engagement</td>
</tr>
<tr>
<td>Historical</td>
<td>Exceeds</td>
<td>Local History</td>
<td>The alumni chapter compiles and digitizes (where applicable) photographs and other documents from past and present.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preservation</td>
<td>Exceeds</td>
<td>Archive</td>
<td>The chapter maintains a brief written history of important events in chapter history.</td>
<td></td>
<td></td>
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</tbody>
</table>

### Interaction

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<tr>
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<tbody>
<tr>
<td>Events</td>
<td>Exceeds</td>
<td>Annual Event</td>
<td>The alumni chapter hosts at least one in-person or virtual event annually.</td>
<td>Submit Your Event</td>
<td>Mary-Michael McClure, Coordinator of Alumni Engagement</td>
</tr>
<tr>
<td></td>
<td>Exceeds</td>
<td>Segmented Event</td>
<td>The alumni chapter hosts events focused or targeting specific subgroups of chapter alumni. (I.e. class reunions, Pi Alphas, Archons, etc)</td>
<td>Submit Your Event</td>
<td>Mary-Michael McClure, Coordinator of Alumni Engagement</td>
</tr>
<tr>
<td></td>
<td>Meets</td>
<td>Graduating Senior Ritual</td>
<td>The alumni chapter collaborates with the student chapter to conduct or participate in a subordinate ritual for graduating seniors.</td>
<td>Graduating Senior Ritual</td>
<td></td>
</tr>
<tr>
<td>Milestone</td>
<td>Exceeds</td>
<td>Legions</td>
<td>The alumni chapter collaborates with the National HQ to present Legions to chapter alumni at least annually.</td>
<td></td>
<td>Mary-Michael McClure, Coordinator of Alumni Engagement</td>
</tr>
<tr>
<td>Recognition</td>
<td>Exceeds</td>
<td>Family Member Program</td>
<td>The alumni chapter actively encourages its members to enroll their members’ children into the Family Member Program.</td>
<td>Family Member Program</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Exceeds</td>
<td>Family Member Program</td>
<td></td>
<td></td>
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</table>
## Involvement

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</tr>
</thead>
<tbody>
<tr>
<td>Active Officers / Committees</td>
<td>Meets</td>
<td>Annual Meeting</td>
<td>The alumni chapter has at least one annual business meeting in person or virtually.</td>
<td>Alumni Chapter Manual</td>
<td>Mary-Michael McClure, Coordinator of Alumni Engagement</td>
</tr>
<tr>
<td></td>
<td>Exceeds</td>
<td>Functioning Committees</td>
<td>The alumni chapter has functioning committees or other officer positions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service</td>
<td>Exceeds</td>
<td>Ability Experience Support</td>
<td>The alumni chapter organizes, hosts, or participates events, sponsored meals or provision of lodging for a Pi Alpha team during a national Ability Experience event (i.e. Build America, Journey of Hope).</td>
<td></td>
<td>Chelsea Ball, Director of Logistics</td>
</tr>
<tr>
<td></td>
<td>Exceeds</td>
<td>Service Projects and Events</td>
<td>The alumni chapter organizes, hosts, or participates in service projects or Challenge Events in the region/nationally.</td>
<td>Regional Construction Events</td>
<td>Andrew Matznick, Assistant Executive Director of Programs</td>
</tr>
</tbody>
</table>

## Investment

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</tr>
</thead>
<tbody>
<tr>
<td>Financial</td>
<td>Meets</td>
<td>Chapter Scholarship</td>
<td>The alumni chapter helps to maintain chapter scholarship(s) or CIF.</td>
<td>Becky Smith</td>
<td>Becky Smith, Associate Director, Leadership Fund</td>
</tr>
<tr>
<td></td>
<td>Exceeds</td>
<td>Foundation Annual Appeal</td>
<td>The alumni chapter actively contributes to Pi Kappa Phi Foundation’s annual appeal.</td>
<td>Ways To Give</td>
<td>Becky Smith, Associate Director, Leadership Fund</td>
</tr>
<tr>
<td></td>
<td>Exceeds</td>
<td>Member Dues</td>
<td>Does your organization collect annual member dues?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support of Student Chapter</td>
<td>Meets</td>
<td>Council of Advisor Support</td>
<td>The alumni chapter actively supports the Council of Advisors through any necessary collaboration and assistance in identifying prospective advisors to add to the Council.</td>
<td>Christy Harrison</td>
<td>Christy Harrison, Director of Chapter Volunteers</td>
</tr>
<tr>
<td>Mentorship</td>
<td>Exceeds</td>
<td>Mentorship / Networking</td>
<td>The alumni chapter provides opportunities for alumni to serve as mentors to undergraduates or other alumni focused on career development or other matters.</td>
<td>Pi Kapp Connect</td>
<td>Mary-Michael McClure, Coordinator of Alumni Engagement</td>
</tr>
<tr>
<td>Recruitment</td>
<td>Exceeds</td>
<td>Legacy Referral</td>
<td>The alumni chapter actively encourages its members to recommend new members / refer legacies.</td>
<td>Recommend a Legacy</td>
<td>Brent Grunig, Assistant Executive Director of Chapter Development</td>
</tr>
<tr>
<td></td>
<td>Exceeds</td>
<td>Alumni Initiate Referral</td>
<td>The alumni chapter assists in the identification of suitable candidates for alumni initiation in coordination with the undergraduate chapter.</td>
<td>Brent Grunig</td>
<td>Brent Grunig, Assistant Executive Director of Chapter Development</td>
</tr>
</tbody>
</table>
Alumni Chapter Status / Housing Corporation Alumni Engagement Status

The Five Areas of Alumni Chapter Excellence not only provide a roadmap to determine what to focus on / prioritize, they also allow for others to understand what each alumni chapter provides. For the purposes of communicating the extent of alumni chapter operations and evaluating performance for awards, the Five Areas of Alumni Chapter Excellence stratify alumni organizations into several status levels based on the total number of actions that completed each year.

Recognized Alumni Chapter / Housing Corporation

Recognized alumni chapters are those who have the basic requirements completed each year in order to remain ‘in good standing’ with the national headquarters. These requirements are enough to achieve and maintain an alumni chapter charter, and be afforded the following rights:

- Liability Coverage
- 10 Votes at Supreme Chapter
- Recognition on Pi Kappa Phi website and in *Star & Lamp*
- Regular communication and educational opportunities through the national headquarters.

Criteria to achieve this status are as follows:

<table>
<thead>
<tr>
<th>Required</th>
<th>All 4 Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meets Expectations</td>
<td></td>
</tr>
<tr>
<td>Exceeds Expectations</td>
<td></td>
</tr>
<tr>
<td>Excels Beyond Expectations</td>
<td></td>
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</table>

Excellence in Engagement

Alumni chapters who receive the Excellence in Engagement award are those who go beyond the basic requirements to fulfill the fundamental tenants of alumni engagement. Beyond the rights afforded to all recognized alumni chapters, these alumni chapters are also eligible for to receive alumni awards for things such as alumni events, newsletters, or websites. Criteria to achieve this status are as follows:

<table>
<thead>
<tr>
<th>Required</th>
<th>All 4 Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meets Expectations</td>
<td>At least 4 out of 9 Completed</td>
</tr>
<tr>
<td>Exceeds Expectations</td>
<td>At least 2 out of 7 completed</td>
</tr>
<tr>
<td>Excels Beyond Expectations</td>
<td>At least 2 out of 7 completed</td>
</tr>
</tbody>
</table>

Champion Master Alumni Chapter

Champion Master Alumni Chapters are those who regularly exceed or excel beyond the expectations of a group of volunteers. Beyond the fundamentals of alumni engagement, these alumni chapters provide both an active, enriching experience for their alumni as well as support to their student chapter and their community. Chapters that reach this status are recognized with the Master Champion Alumni Chapter award, but are also qualified to win the Alumni Chapter of the Year award. Criteria to achieve this status are as follows:

<table>
<thead>
<tr>
<th>Required</th>
<th>All 4 Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meets Expectations</td>
<td>At least 7 of 9 Completed</td>
</tr>
<tr>
<td>Exceeds Expectations</td>
<td>At least 5 of 7 Completed</td>
</tr>
<tr>
<td>Excels Beyond Expectations</td>
<td>At least 4 of 7 Completed</td>
</tr>
</tbody>
</table>