



**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:

Required
Meets Expectations
Exceeds Expectations
Excels Beyond Expectations

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**

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

## Information

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

## Interaction

Category	Level	Action	Expectation	Resources/ Webpages	Staff Contact
Events	Exceeds	Annual Event	The alumni chapter hosts at least one in-person or virtual event annually.	<a href="#">Submit Your Event</a>	<a href="#">Mary-Michael McClure</a> , Coordinator of Alumni Engagement
	Exceeds	Segmented Event	The alumni chapter hosts events focused or targeting specific subgroups of chapter alumni. (i.e. class reunions, Pi Alphas, Archons, etc)	<a href="#">Submit Your Event</a>	<a href="#">Mary-Michael McClure</a> , Coordinator of Alumni Engagement
	Meets	Graduating Senior Ritual	The alumni chapter collaborates with the student chapter to conduct or participate in a subordinate ritual for graduating seniors.	<a href="#">Graduating Senior Ritual</a>	
Milestone Recognition	Exceeds	Legions	The alumni chapter collaborates with the National HQ to present Legions to chapter alumni at least annually.		<a href="#">Mary-Michael McClure</a> , Coordinator of Alumni Engagement
	Excels	Family Member Program	The alumni chapter actively encourages its members to enroll their members' children into the Family Member Program.	<a href="#">Family Member Program</a>	

## Involvement

Category	Level	Action	Expectation	Resources / Webpages	Staff Contact
Active Officers / Committees	Meets	Annual Meeting	The alumni chapter has at least one annual business meeting in person or virtually.	<a href="#">Alumni Chapter Manual</a>	<a href="#">Mary-Michael McClure</a> , Coordinator of Alumni Engagement
	Exceeds	Functioning Committees	The alumni chapter has functioning committees or other officer positions.		
Service	Exceeds	Ability Experience Support	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).		<a href="#">Chelsea Ball</a> , Director of Logistics
	Excels	Service Projects and Events	The alumni chapter organizes, hosts, or participates in service projects or Challenge Events in the region/nationally.	<a href="#">Regional Construction Events</a>	<a href="#">Andrew Matznick</a> , Assistant Executive Director of Programs

## Investment

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

### Alumni Chapter Status /Housing Corp. 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:

Required	All 4 Completed
Meets Expectations	
Exceeds Expectations	
Excels Beyond Expectations	

### 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:

Required	All 4 Completed
Meets Expectations	At least 4 out of 9 Completed
Exceeds Expectations	At least 2 out of 7 completed
Excels Beyond Expectations	At least 2 out of 7 completed

### 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:

Required	All 4 Completed
Meets Expectations	At least 7 of 9 Completed
Exceeds Expectations	At least 5 of 7 Completed
Excels Beyond Expectations	At least 4 of 7 Completed