



The Five Areas of Focus for Alumni Chapters
Last Updated: 10/19/2021

Goals of an alumni chapter can be broken down into five objectives, the first being Infrastructure, the basic framework the organization needs in order to maintain sustainably. These required actions must be completed annually to remain in good standing. The other four areas are key components of alumni engagement: Information, Interaction, Involvement and Investment.

To provide clarity within operations, there are categories in each objective broken down into specific actions. The actions 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, the categories and actions are 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 an alumni chapter plan, it is important to consider the 'Required' and 'Meets Expectations' actions as the immediate priority. The 'Exceeds Expectations' and 'Excels Beyond Expectations' actions are optional and are 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		Alumni Services
Reporting	Required	Annual Survey	Annual Alumni Chapter Survey completed and submitted to National HQ.	Annual Alumni Chapter Survey	
	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.	Download Sample Constitution and By Laws	
Legal Status	Meets	Federal filings	Establish organization as a federal non-profit.	IRS - 501c7	
	Meets	Completes the IRS 990	Completes the IRS 990	IRS - 990	

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.	Newsletter Template Guide	Alumni Services
	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.	Brand Guidelines	Communications, 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.	Alumni List Request Form	Alumni Services
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	Meets	Graduating Senior Ritual	The alumni chapter collaborates with the student chapter to conduct or participate in a subordinate ritual for graduating seniors.	Graduating Senior Ritual	
	Exceeds	Annual Event	The alumni chapter hosts at least one in-person or virtual event annually.	Submit Your Event	Alumni Services
	Exceeds	Segmented Event	The alumni chapter hosts events focused or targeting specific subgroups of chapter alumni. (i.e. class reunions, Pi Alphas, Archons, etc)	Submit Your Event	Alumni Services
Milestone Recognition	Exceeds	Legions	The alumni chapter collaborates with the National HQ to present Legions to chapter alumni at least annually.		Alumni Services
	Excels	Family Member Program	The alumni chapter actively encourages its members to enroll their members' children into the Family Member Program.	Family Member Program	

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.	Alumni Chapter Manual	Alumni Services
	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).		Andrew Matznick , Assistant Executive Director of Programs

	Excels	Service Projects and Events	The alumni chapter organizes, hosts, or participates in service projects or Challenge Events in the region/nationally.	Regional Construction Events	Andrew Matznick , Assistant Executive Director of Programs
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Investment

Category	Level	Action	Expectation	Resources / Webpages	Staff Contact
Financial	Meets	Chapter Scholarship	The alumni chapter helps to maintain chapter scholarship(s) or CIF.		Becky Smith , Associate Director, Leadership Fund
	Exceeds	Foundation Annual Appeal	The alumni chapter actively contributes to Pi Kappa Phi Foundation's annual appeal.	Ways To Give	Becky Smith , 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.		Christy Harrison , Senior Chapter Relationship Manager
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.	Pi Kapp Connect	Alumni Services
Recruitment	Excels	Legacy Referral	The alumni chapter actively encourages its members to recommend new members / refer legacies / Alumni initiates.	Recommend a Legacy	Luke Lenfestey Growth Coordinator
	Excels	Alumni Initiate Referral	The alumni chapter assists in the identification of suitable candidates for alumni initiation in coordination with the undergraduate chapter.		Chris Huffman Senior Director Chapter Development

Alumni Engagement Status for Alumni Chapter / Housing Corp.

The Five Areas of focus provides a roadmap to determine focus and priorities. Additionally, it allows others to understand what alumni chapter provides. For communicating the extent of alumni chapter operations and evaluating engagement, the Five Areas of Alumni Chapter Excellence stratify alumni organizations into several status levels based on total number of actions completed each year.

Recognized Alumni Chapter / Housing Corporation

Recognized alumni chapters meet basic requirements each year in order to remain 'in good standing' with National Headquarters. These requirements maintain an alumni chapter charter, and afford 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 achieve Excellence in Engagement go beyond the basic requirements to fulfill the tenants of alumni engagement. Beyond the rights afforded to all recognized alumni chapters, these alumni chapters are also eligible for additional awards 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 regularly exceed or excel beyond the expectations of a group of volunteers. Surpassing fundamentals of alumni engagement, these alumni chapters provide an active and enriching experience for their alumni. Additionally, they support their student chapter and community. Chapters that reach this status are recognized with the Master Champion Alumni Chapter award and are 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