



## HOW TO START AN ALUMNI ASSOCIATION

Letter from the President

Brothers,

It is inspiring to see that Alpha Phi Omega is still a part of your life. What a great example for our students to see members making a long-term commitment to the Fraternity. It is wonderful to have alumni who view Alpha Phi Omega not just as something they did in college, but as a way of life.

Establishing a national alumni association is a great way to be of service as you're new, old and form new friendships. This guide will provide a template for your efforts. As with any endeavor, what you get out of it is determined by what you put into it. Thank you for being the spark needed to build the template into a living, breathing alumni association.

Whether your association is tied to one chapter or to a geographic region, there are great opportunities to work with student members. Your availability as a resource can be of great help to our chapters and your continuing service will provide a great example.

Again, thank you for taking on this exciting challenge. I look forward to adding your group to the rolls of recognized alumni associations of Alpha Phi Omega. Your Leadership, Friendship and Service are greatly appreciated.

Fraternally,

A handwritten signature in cursive script that reads "Maggie Katz". The signature is written in black ink and is positioned above the printed name.

Maggie Katz

# TABLE OF CONTENTS

|  |    |
|--|----|
| What is an Alumni Association?                                   | 3  |
| National Bylaws: Article XII – Alumni                            | 3  |
| Why Start an Alumni Association?                                 | 4  |
| Getting Started  | 4  |
| Recognition  | 5  |
| First Things First   | 5  |
| Recruiting Membership  | 6  |
| Establishing a Core  | 6  |
| Methods of Recruiting  | 6  |
| Organizing   | 7  |
| Bylaws   | 8  |
| Fiscal Policies  | 8  |
| Officers and Elections   | 9  |
| Strategic Planning   | 9  |
| After Recognition  | 9  |
| Incorporation, Charitable Organization and Tax-Exempt Status     | 9  |
| Liability Insurance  | 10 |
| Conclusion   | 10 |
| Appendix A: Recognition/Renewal Form                             | 11 |
| Appendix B: Official Roster of Members                           | 12 |
| Appendix C: Risk Management Policy                               | 13 |
| Appendix D: Sample Bylaws  | 17 |
| Bylaws of an Alpha Phi Omega GEOGRAPHIC-BASED Alumni Association | 17 |
| Bylaws of an Alpha Phi Omega CHAPTER-BASED Alumni Association    | 19 |

## What is an Alumni Association?

Alumni associations are organized groups of alumni members officially recognized as such by the Fraternity. A definition was developed by the Board of Directors in 1993 and reads as follows:

*An "officially recognized local alumni association" is a group of Alpha Phi Omega National Service Fraternity alumni organized for the purpose of furthering the aims and goals of the Fraternity and the mission of the National Alumni Association. The mission and purpose of the alumni program of the Alpha Phi Omega National Service Fraternity shall be to encourage support of the Alpha Phi Omega National Service Fraternity; to serve, inform and involve alumni of the Fraternity so as to foster interaction and friendship among Alpha Phi Omega members of all ages; and to promote civic and professional service by Alpha Phi Omega alumni.*

## National Bylaws: Article XII – Alumni

### SECTION 1. NATIONAL ALUMNI ASSOCIATION.

(1) FORMATION. There shall be a National Alumni Association of Alpha Phi Omega composed of alumni members of Alpha Phi Omega [See Article III, Section 2 (7)]. The National Alumni Relations and Internal Volunteer Development Committee Chair shall also serve as the National Alumni Association Chair.

(2) PURPOSE. The purpose of the National Alumni Association shall be to encourage support of Alpha Phi Omega National Service Fraternity, to serve, inform and involve alumni of Alpha Phi Omega National Service Fraternity so as to foster interaction and friendship among Alpha Phi Omega members of all ages, and to promote civic and professional service by Alpha Phi Omega alumni. All members of the National Alumni Association are encouraged to carry the principles and ideals of Alpha Phi Omega to their civic and business community and to provide leadership and service to those affiliations to the best of their ability.

### SECTION 2. LOCAL ALUMNI ASSOCIATION.

(1) Alumni members may organize themselves locally into any or all of the following:

- (a) Alumni associations composed of the alumni of a single chapter;
- (b) Alumni associations composed of all alumni members within a single geographical area; or
- (c) Any combination of alternatives within this section or any other method of local association which local alumni may deem desirable with the approval of the National Alumni Relations and Internal Volunteer Development Committee.

(2) The purpose of local alumni associations shall be to promote the principles of Alpha Phi Omega among alumni members and the entire Fraternity through such activities as the local alumni associations may deem desirable.

(3) Membership in an Alpha Phi Omega alumni association shall be granted only to persons who are duly registered in the National Office as former active, advisory, or honorary members of a chapter. Alpha Phi Omega alumni associations shall not grant any form of membership:

- (a) that does not comply with the above standards or
- (b) to any member expelled from the Fraternity under Article III, Section 2 (11).

(4) Each recognized local alumni association shall annually reaffirm its recognition by January 15 by application to the National Alumni Relations and Internal Volunteer Development Committee. New associations may apply for recognition at any time. Initial recognition for an alumni association or annual reaffirmation of recognition shall consist of the filing of the required forms with the National Alumni Relations and Internal Volunteer Development Committee. Recognition must be certified or rejected by the National Alumni Relations and Internal Volunteer Development Committee within one month from receipt of the properly prepared forms. The fee for formal recognition will be \$25. The minimum requirements for initial recognition will be no fewer than five alumni members. Additional requirements for alumni associations may be established at the discretion of the National Alumni Relations and Internal Volunteer Development Committee with majority approval by the Board of Directors.

### SECTION 3. REGIONAL ALUMNI COUNCILS

(1) There shall be an alumni council in each region of Alpha Phi Omega formed and chaired by the National Alumni Relations and Internal Volunteer Development Committee member for that region.

(2) The regional alumni council shall be composed of at least one alumni member from each recognized alumni association within the region and at least one alumni member-at-large from the region, appointed by the regional alumni council chair. The council shall also include at least one alumni member-at-large from each section, appointed by the regional alumni council chair and approved by the respective section chair, in order to represent the interests of those alumni not affiliated with a recognized alumni association within said region.

(3) The regional alumni council shall aid local alumni associations within the region, aid the National Alumni Association in locating and maintaining contact with alumni within the region, coordinate all regional alumni meetings and activities, and elect the alumni voting delegate to the National Convention with the certification of the region director. It shall also serve as an advisory board to the region director concerning issues related to alumni affairs.

### SECTION 4. ALUMNI VOTING POWER.

At National Conventions, each region [as defined in Article XI, Section I (2)] shall have one alumni vote.

Typically, there are two types of alumni association: chapter and geographic. Chapter-based associations are comprised of alumni from a specific chapter; while geographic-based associations pull in members from a given geographic area. Both have unique characteristics and opportunities and are viable options in terms of organizing. Both types of associations have characteristics that allow them to create and sustain a relationship with local chapters, if that is desired.

#### Chapter-Based

- Are open to all members of a specific chapter
- Members share a common history, traditions, "language," etc.
- Emotional connection to each other and the chapter
- Establishing relationship with chapter can be easier
- Can serve as a career connection/network for new alumni
- Can support the chapter as requested; potential fundraising for chapter/chapter event easier
- Geographic distribution of alumni may limit joint activities

#### Geographic-Based

- Connection to each other needs to be established (why have we come together)
- Help older alumni become reacquainted with the Fraternity by hosting local events
- Can be a "welcome wagon" for new alumni moving to a new metro area
- Multiple local area chapters allow for diverse membership basis
- Proximity to chapters can offer varied events in which to assist or to attend
- Can support the Fraternity on a sectional or regional level

## Why Start An Alumni Association?

Starting an alumni association is a challenging yet rewarding opportunity to enhance the Alpha Phi Omega experience for yourself and fellow brothers. Alumni associations provide a special opportunity to build a lasting relationship with the Fraternity following your collegiate experience. Choosing to form and develop such an association shows a great deal of commitment on the part of the association's founders to the principles and eternal goal of expanding the Fraternity's reach. The experience is challenging, but will prove its worth in many positive ways.

## Getting Started

While this next section provides an outline of the startup process and some helpful tips, the best piece of advice we can provide is to "just do it." In many ways, starting an alumni association is no different than taking the lead of any other project. First, you must identify and work with others who share a common

interest. Then, plan a program, and execute it in the form of activities. The benefit of limited paperwork required in order to register your association with the Fraternity allows you to focus on your primary goal: bringing alumni together.

## ***Recognition***

In order to use the name “Alpha Phi Omega,” or the Fraternity symbols, your alumni association must be recognized by the Fraternity. This requires the completion of a few organizational tasks that can be performed by the interested group members shortly after establishing the association and holding initial activities. Both chapter- and geographic-based associations need to complete the same forms and requirements to be recognized.

To gain official recognition, an association must complete and submit the following:

- Completed Alumni Association Application (Appendix A)
- Roster of Members (Appendix B)
- Association Bylaws (Example Available in Appendix D)
- \$25 Recognition Fee
- Copy of National Risk Management Policy Signed by Association Leader (Appendix C)
- IRS Form \*990N verification of timely filing

The application serves to establish contact information for the association and list its officers and members. This must be completed in order to gain recognition for that year, through December 31.

The Alumni Association Application must be re-submitted annually to the National Office before January 15 to maintain recognition. A member roster should accompany this form. If an alumni association forgets to re-submit this form and its roster, it will have to re-submit the entire packet (contents listed above) the following January 15.

All components of the application should be mailed to:

Alpha Phi Omega  
14901 East 42<sup>nd</sup> St. South  
Independence, MO 64055-7347

Once received by the National Office, application materials are reviewed by the National Office staff and the Alumni Relations and Internal Volunteer Development Director. Recognition usually occurs within a couple of weeks. However, associations should not wait for formal approval in order to commence activities. Associations can choose to have a few activities prior to submitting an application in order to grow membership. Once established, however, it is necessary to be officially recognized in order to use the name “Alpha Phi Omega” or any Fraternity symbols.

## ***First Things First***

Startup involves two specific tasks: recruitment and organization. In order to “have” an alumni association, you need members. Once membership is established, the association has to set ground rules for how things will operate.

From an organizational perspective, there is an important initial decision that has to be made. Is this going to be a geographic association or a chapter association? This impacts who can be members within the association. While this decision can be made after recruiting some initial members to reach consensus, the earlier it is decided, the better foundation the group will have when it comes to further recruiting and organizing. Don’t forget: it is possible to have more than one alumni association in an area. If you are starting a chapter-based association and find a number of nonchapter alumni in the area, encourage them to start a geographic one and vice versa.

## Recruiting Membership

The recruitment process can be most easily broken down into four components:

- Establishing a Core Membership
- Identifying Potential Members
- Communication with Members
- Meetings and Activities

## Establishing a Core

The first step in the recruitment process is establishing a core membership. The best way to establish the necessary core membership (which may be as small as five or six people) is by recruiting those you already know. Talk to other alumni that fit the association membership criteria you have in mind. At this point you're solely looking to get another four or five individuals to help you with the start-up process. Your core members should help to create the purpose of the organization beyond the type, as this information will help drive association recruitment. One of the first things that you should decide as a group is what type of communication the group would like to use. Just remember that you may find some alumni are not as computer savvy as others, so make sure that everyone will get the messages and information regarding meetings.

## Methods of Recruiting

|  |   |
|--|---|
| <i>Word of Mouth</i>                           | How did you hear about Alpha Phi Omega? At some point you heard people talking about it and you were interested. As you find one individual, inquire of them if they know of others who might be interested. Word of mouth can be an extremely powerful tool. In addition, because these will be people you already know, working with them closely on forming the association will be easier because you will already be comfortable with them.  |
| <i>Alumni Lists</i>                            | <p>The National Office provides one free alumni list each year. Requests should be made <a href="#">online</a> or by calling the National Office (816-373-8667).</p> <p>Lists requests can be generated based on:</p> <ul style="list-style-type: none"> <li>• City</li> <li>• State</li> <li>• Zip code</li> <li>• Chapter affiliation</li> </ul> <p>Lists will tend to be VERY large, sometimes in the thousands. Addresses are not guaranteed to be up-to-date. Only Life Member addresses are updated regularly. As contacts are made, please send updates back to the National Office.</p> |
| <i>Chapter Alumni Secretaries/Coordinators</i> | <p>Get in touch with your home chapter. Most brothers will maintain contact with their chapter more than the Fraternity. See if your chapter has any of the following:</p> <ul style="list-style-type: none"> <li>• Chapter-maintained alumni contacts</li> <li>• Connection with recent alumni and graduating seniors</li> <li>• Contact with current and former advisors and honorary members</li> </ul> <p>Be prepared, to explain who you are (if you graduated some time ago, the current brothers may know you) and why you are requesting the information.</p>                           |
| <i>University Alumni Offices</i>               | For a chapter-based alumni association, the alumni office at your home school   |

|                     |  |
|---------------------|--|
|                     | <p>may have the most current information for alumni. Find out if you can:</p> <ul style="list-style-type: none"> <li>• Request a list of alumni who listed Alpha Phi Omega as an activity.</li> <li>• Request a hardcopy alumni directory</li> <li>• Request an announcement in the alumni newsletter or magazine about your association, with contact information and a brief description of efforts</li> <li>• Participate in homecoming or alumni reunion events</li> <li>• Possibly fund on-campus alumni activities</li> </ul> <p>Remember, its ok to ask. If you are told no, ask if they have alternative options to what you are requesting.</p>   |
| <i>News Media</i>   | <p>Almost all provide free announcements of community groups and events, membership drives, etc. You will have to contact each of these outlets separately to inquire about procedures and deadlines. Consider contacting local:</p> <ul style="list-style-type: none"> <li>• Newspapers (including online)</li> <li>• Magazines (including online)</li> <li>• Television stations</li> <li>• Radio stations</li> </ul>  |
| <i>The Internet</i> | <p>The number of Alpha Phi Omega related listservs, groups and chats on the Internet is mind-boggling. A search of the category “Alpha Phi Omega” on <i>yahogroups.com</i> alone yielded 419 different groups. Soon, maybe your alumni association will be one of them!</p> <p>Yahoo Groups <a href="http://groups.yahoo.com">http://groups.yahoo.com</a><br/> LiveJournal <a href="http://www.livejournal.com">http://www.livejournal.com</a><br/> MySpace <a href="http://groups.myspace.com">http://groups.myspace.com</a><br/> Facebook <a href="http://www.facebook.com">http://www.facebook.com</a></p> <p>Advertise your alumni association via all of these means. Just make certain that your information is the same on each site. You also might consider creating a Web site for your association.</p> <p>Be aware that when you use such sites to advertise your association, you are representing Alpha Phi Omega, and as such, you are responsible for maintaining the Fraternity standards. Do not put anything online that you would not want your non-APO friends, your boss, or your mother to see.</p> |

These are some methods that have been used in the past to organize alumni associations. Do not feel limited by them and if you have any other ideas, utilize them and share the methods with other associations.

## **Organizing**

### **Structure**

Structure is defined by each association when it forms. Most associations will establish their purpose early in the process as a means to entice members. Within the Association Bylaws and Articles of Association the purpose of the organization, the roles of the officers, committees and program are defined. Usually, there will be several officers, elected by the membership and members of varying age, experience and commitment to Alpha Phi Omega.

### **Program**

The programs of an alumni association are the activities undertaken by the local association and its members. The programs can, but are not required to, include service projects, social functions and

leadership activities. They also can participate in chapter, sectional or regional events, conferences and other activities. Some members also may have families (including children) who may be interested in participating in association activities.

There is usually no minimum program participation requirement prescribed to each member of an association. Therefore, the association's program should be diverse, and possibly place less emphasis on maximum membership participation for each activity, instead focusing on meeting the needs of its diverse membership. The program should reflect both the long- and short-term objectives of the group. For example, the scheduling of a fundraiser for next month would be a short- term objective, but to use the money raised to build a future scholarship fund reflects a long-term objective.

Program planning should also take into consideration the family life of its members, possibly including other members of the family in the activities of the program. Time and interest of the entire membership are also key components of the decision making process. There is no requirement regarding the type or number of programs offered by an association, the will and want of the members entirely governs the offered programs.

Examples of possible activities include:

**Leadership Activities:** sponsoring career days, instructing a Merit Badge College class, mentoring chapter officers and committees when asked

**Service Projects:** trash cleanups, creating nature trails, local food pantries projects, walkathons, charity fundraisers, youth events

**Social Functions:** camp-outs, vacation trips, canoe trips, picnics, happy hours, bowling leagues, and attending sporting events (tailgating)

## ***Bylaws***

The bylaws are the governing document for the association. Whether the association is geographic- or chapter-based, the association must have bylaws as broad or limited as desired. There are no specific requirements for the contents of these bylaws; however, they will probably include:

- Requirements of membership
- Identification of leaders
- Selection of leaders
- Establishment of treasury

Since each association needs to be approved by the Alumni Relations and Internal Volunteer Development Director, each should have some formal rules by which it governs its program. The bylaws should set forth its name, purpose, association officers and committees, and operation of the general program. A set of sample bylaws is included in Appendix C.

## **Fiscal Policies**

Alumni associations are allowed and encouraged to collect dues to cover operational costs, but specifics are up to each association.

In order to keep personal and association monies separate, associations are encouraged to open a bank account. It is recommended that an account be established in the name of the association to ensure proper accounting of funds as well as to allow for officer transition. A properly set up association account will protect the personal identity of officers named on the account. To establish such an account, the association must have an Employer Identification Number (EIN) provided by the IRS. This number is also related to the association's 501(c)(3) subordinate status under the Fraternity. Once an association is formally recognized, the National Office will provide a partially completed EIN application with directives on final completion by an officer of the alumni association. An officer should complete the application and mail it in or complete an online application to receive the EIN. Once the EIN is provided by the IRS the officer needs to provide the number to the National Office for entry into the national database. Be sure to note your

year end date when applying for the EIN as this will determine the due date of the form 990N or 990EZ. Beginning in FY2007-2008 all associations are required (by the IRS) to submit a 990N or 990EZ form. The EIN number is necessary to complete this form and proof of completion may be a requirement for renewal.)

## **Officers and Elections**

As mentioned earlier, planning activities while establishing an association falls upon the leadership.

The number and composition of officers in an association is completely flexible. Typical positions include president, vice presidents (social, service, recruitment), secretary and treasurer. In general, alumni associations do not require as many officers as chapters since they usually meet less often and have fewer functions. If you would like, a line of succession can be established; these procedures should be included in the association bylaws.

Remember that all officers are volunteers, but once volunteered and elected, they have chosen to take responsibility. Look to the officers for leadership.

*“Running for office is voluntary. Completing the duties of office is not.”  
- Past National President Jack McKenzie*

## **Strategic Planning**

Once formed, new associations should consider some type of planning session concerned with developing a long-term plan of action. This will help the leadership direct the energies of the membership. Traditional strategic planning consists of the following steps:

- Establishing a mission
- Setting SMARTER goals (See Appendix G)
- Identifying actions that achieve the goals
- Scheduling activities that encompass the actions

Plenty of resources exist that explain the process in further detail, but if you keep this simple outline in mind, strategic planning should be expedient, complimentary and effective.

## **After Recognition**

The Alumni Relations Subcommittee has seen the need for a more extensive support manual to be sent after an association has been recognized. However, while awaiting formal recognition, an association can make some forward-looking decisions and, in some cases, begin paperwork to be submitted at a later date.

## ***Incorporation, Charitable Organization and Tax-Exempt Status***

Once officially recognized by the Fraternity, an association is normally considered a subordinate of Alpha Phi Omega, and a 501(c)(3) charitable organization. This typically means that incorporation in the association state would not be applicable. If in doubt, the state in which the alumni association is formed should be consulted for correct procedures. *The National Office staff should be contacted for the appropriate forms, once the association is recognized.*

Sales tax exempt status is completely separate from 501(c)(3) tax exempt status and should be handled on a state-by-state basis. The individual state in which the association is formed should be consulted to determine eligibility and procedures for application. Normally, your association will need the federal EIN in order to apply for state sales tax exemption.

\*Some exceptions are applicable. Contact the accountant, [accountant@apo.org](mailto:accountant@apo.org), with specific questions.

### ***Liability Insurance***

Volunteers and alumni members who belong to an alumni association are covered by the Fraternity's liability insurance. It is important that all associations be registered and have a current roster of members on file with the National Office in order to ensure insurance coverage.

This insurance covers liability (someone threatens to sue the association and or its officers) and is not medical coverage (someone gets hurt at an event). To find the latest information on what the insurance covers and how to get proof of insurance visit the Fraternity's Web site:

[http://www.apo.org/pages/show/Chapter\\_Resources/Insurance](http://www.apo.org/pages/show/Chapter_Resources/Insurance) .

### **Conclusion**

Hopefully, the information in this manual provides the proper foundation for starting an alumni association. Once organized, however, the need for initiative is far from over. Just like with a chapter, continued effort is essential to long-term success and a meaningful experience for those who choose to take part.

No matter which type of alumni association your group has chosen to form, the opportunity to work with, provide service to, and continue to live the principles of Alpha Phi Omega with active chapters and members is a great privilege. While we should be mindful of the importance of chapter/member autonomy, a healthy relationship with local chapters can serve to grow and sustain both groups.

***Alpha Phi Omega wishes you good luck in starting an alumni association, and looks forward to making your association part of our ever-growing Fraternity family!***

# Appendix A: Recognition/Renewal Form

## Alpha Phi Omega

### NATIONAL SERVICE FRATERNITY ANNUAL ALUMNI ORGANIZATION RECOGNITION FORM

Region: \_\_\_\_\_ Date: \_\_\_\_\_ Year of Recognition: \_\_\_\_\_ *Due Annually by May 15*

Name of Alumni Organization: \_\_\_\_\_

Mailing Address:

Street/P.O. Box \_\_\_\_\_

Zip Code \_\_\_\_\_ State \_\_\_\_\_ City \_\_\_\_\_

Phone Number \_\_\_\_\_ Web site URL \_\_\_\_\_

E-mail \_\_\_\_\_

Contact Person: \_\_\_\_\_

E-mail: \_\_\_\_\_

Phone: \_\_\_\_\_

List Officers: (Member # and Addresses are required)

| Member # | Name & Office | Address | Phone # | E-mail |
|----------|---------------|---------|---------|--------|
|          |               |         |         |        |
|          |               |         |         |        |
|          |               |         |         |        |
|          |               |         |         |        |
|          |               |         |         |        |

PLEASE LIST OTHER ORGANIZATION MEMBERS AND ADDRESSES ON NEXT PAGE.

(Attach a separate sheets as necessary)

- 
- Form Enclosed
  - Roster of Members Listed / "O go dgtuj kr "%r gtuppcn'cf f tguugu'cpf "o ckf gp'pco gu'ctg'tgs wktgf 0
  - \$25 Annual Fee Enclosed / "f wg'd{ "O c{ "37vj
  - Alumni Organization Bylaws Enclosed \*tgs wktgf "gcej "{ gct+
  - Signed Risk Management Form Enclosed
- 

RETURN FORM ( 'HGG'TO:

Alpha Phi Omega  
14901 E. 42nd St. South  
Independence, MO 64057/9569

## Appendix B: Official Roster of Members

(Member #'s and Addresses are required for member verification. Maiden names are also helpful.)

|    | Member # | Complete Name | Complete Address | E-mail | Check If Any Changes |
|----|----------|---------------|------------------|--------|----------------------|
| 1  |          |               |                  |        |                      |
| 2  |          |               |                  |        |                      |
| 3  |          |               |                  |        |                      |
| 4  |          |               |                  |        |                      |
| 5  |          |               |                  |        |                      |
| 6  |          |               |                  |        |                      |
| 7  |          |               |                  |        |                      |
| 8  |          |               |                  |        |                      |
| 9  |          |               |                  |        |                      |
| 10 |          |               |                  |        |                      |
| 11 |          |               |                  |        |                      |
| 12 |          |               |                  |        |                      |
| 13 |          |               |                  |        |                      |
| 14 |          |               |                  |        |                      |
| 15 |          |               |                  |        |                      |
| 16 |          |               |                  |        |                      |
| 17 |          |               |                  |        |                      |
| 18 |          |               |                  |        |                      |
| 19 |          |               |                  |        |                      |
| 20 |          |               |                  |        |                      |
| 21 |          |               |                  |        |                      |
| 22 |          |               |                  |        |                      |
| 23 |          |               |                  |        |                      |

# **Appendix C: Risk Management Policy**

## **Alpha Phi Omega**

### **Risk Management Policies**

#### **HAZING**

No Alpha Phi Omega member shall take part in hazing activities. Hazing activities are defined as (but not limited to):

Any action taken or situation created, intentionally, whether on or off Fraternity premises or during Fraternity functions, to produce mental or physical discomfort, embarrassment, harassment, or ridicule. Such activities may include but are not limited to the following: use of alcoholic beverages; paddling in any form; branding; creation of excessive fatigue, physical or psychological shocks; quests; treasure hunts; scavenger hunts, road trips; or any other such activities carried on in the name of the Fraternity; wearing of public apparel which is conspicuous and not normally in good taste; engaging in public stunts and buffoonery; morally degrading or humiliating games and activities; and any other activities which are not consistent with fraternal law, ritual or policy or the regulations and policies of the educational institution and local, state and federal laws.

#### **SEXUAL HARASSMENT / ABUSE / DISCRIMINATION**

The Fraternity will not tolerate or condone any form of abusive or discriminatory behavior on the part of its members, whether physical, mental or emotional in respect to sex, race, ethnicity, physical or emotional handicap, age, marital status or sexual preference. This is to include any actions, which are deemed to be demeaning to all but not limited to date/gang rape or verbal harassment.

#### **CONTRACTUAL and FINANCIAL ISSUES**

No chapter, section or region shall enter into a contract or financial agreements using the specific name of Alpha Phi Omega. Qualifying statements as to which chapter, section, or region must accompany all agreement entered into for the purposes of supporting Fraternity functions. This includes, but is not limited to, such agreements as leases, contracts, hold harmless agreements, liability releases, account agreements, purchase orders, and hotel or banquet contracts.

#### **ALCOHOL and DRUGS (SUBSTANCE ABUSE)**

The possession, use and/or consumption of alcoholic beverages, during any Fraternity event, any event that an observer would associate with the Fraternity, or in any situation sponsored or endorsed by the chapter, must be in compliance with any and all applicable laws, policies and regulations of the state, county, city and institution of higher education. The unlawful possession, sale and/or use of any illegal drugs or controlled substances at any Fraternity sponsored event, or at any event that an observer would associate with the Fraternity, is strictly prohibited. Chapters, interest groups and petitioning groups of Alpha Phi Omega National Service Fraternity shall not use or condone the use of alcoholic beverages as part of their membership recruitment rush or pledge education programs. A violation of this policy shall be deemed a violation of the membership policies of Alpha Phi Omega National Service Fraternity.

#### **PERSONAL PROPERTY**

Use of personal property in Fraternity activities shall be strictly voluntary and the sole responsibility of the owner. Alpha Phi Omega shall not assume liability for personal property used in conjunction with Fraternity activities, nor for any damages resulting from said use.

## **TRANSPORTATION ISSUES**

Any individual who drives or otherwise provides transportation in conjunction with Alpha Phi Omega activities shall obey all applicable motor vehicle laws, including, but not limited to, those concerning vehicle safety, vehicle operation, insurance, and the transportation and consumption of alcoholic beverages. Operators will ensure that vehicles are not overloaded and are driven in a safe manner. Rental vehicles shall be operated in accordance with rental contracts. Use of personal vehicles shall be strictly voluntary and the sole responsibility of the vehicle owner/operator. Alpha Phi Omega shall not assume liability for personal vehicles used in conjunction with Fraternity activities, nor for any damages resulting from said use.

## **GENERAL HEALTH AND SAFETY**

All activities planned in conjunction with Alpha Phi Omega shall take into account the health and safety of all participants. Planning of Alpha Phi Omega projects and activities will include appropriate personal safety equipment (ear plugs, eye protection, gloves, etc.), training (use of tools and equipment), and supervision. All equipment to be used in conjunction with Alpha Phi Omega activities will be in good working condition and will be used in a safe manner.

## **ADVISORS**

Advisors and alumni serving Alpha Phi Omega on behalf of their employer or respective volunteer agency (educational institution, youth service organization, etc.) will do so in accordance with the policies of said entity, including, but not limited to, risk management and personal liability. Advisors and alumni shall adhere to the provisions of this and all applicable policies of the Fraternity when engaging in Fraternity-related activities. Advisors and alumni shall recognize the appropriate authority of elected or appointed officers, representatives or employees of the Fraternity in questions of policy, and shall not engage in activities designed to circumvent Fraternity policies.

## **EDUCATION**

All reasonable efforts will be made to ensure each student member, pledge, associate member, advisor, and honorary member shall be instructed on the Fraternity's Risk Management Policy annually. Active chapters will indicate their understanding of and compliance with the Risk Management Policy statement on an annual basis. Organizers of Fraternity events will reasonably inform guests (including nonmembers, alumni, advisors and visiting members) of applicable policies.

# **Alpha Phi Omega Membership Policies**

- I. **Pledge Ritual:** The Pledge Ritual remains an effective statement of Fraternity policy regarding treatment of pledges during their preparation for active membership.
- II. **Initiation Ritual:** The Initiation Ritual remains an effective statement of Fraternity policy regarding conduct of members of Alpha Phi Omega.
- III. **Other Policies:** In addition to statements in these rituals, it is the policy of Alpha Phi Omega that:
  - A) Membership shall be granted only by members of an active chapter, or by the Board of Directors in the case of honorary membership.
  - B) Because all people have the potential to be of service and to be leaders and friends, active membership is open to all students and should represent a cross section of the student

body. Chapters have the right to determine their own membership. Active membership shall be granted only within the context of the National Bylaws, the Standard Chapter Articles of Association, and the rules and regulations of the school involved.

- C) Chapter membership requirements may be adopted that are not in conflict with state and local law, the National Bylaws and Standard Chapter Articles of Association of Alpha Phi Omega, or the rules and regulations of the school at which the chapter is located; and that conform with the philosophy and policy of Alpha Phi Omega as outlined in the National Pledging Standards.
- D) The purpose of a pledge program is to make it possible for pledges to acquire the knowledge and skills necessary to function as effective active members of the Fraternity. Therefore, the ultimate aim of every pledging period is to teach the worth of human dignity, promote academic scholarship, instill a commitment to continuing service, provide opportunities to participate in leadership development experiences, and cultivate friendship among the pledges and with the active members. Pledge programs should also ensure that pledges become thoroughly familiar with the principles, ideals and heritage of Alpha Phi Omega.
- E) All pledging activities must have a clear and reasonable positive benefit, be consistent with the principles and spirit of Alpha Phi Omega, and involve no risk of humiliation or injury to any person.
- F) Those preparing for active membership (as one of the seven types of membership in Alpha Phi Omega) are representatives of Alpha Phi Omega. As such, they shall be treated with the same degree of respect as active members and shall participate in, or be asked to participate in, only those activities that are consistent with the membership policies of Alpha Phi Omega.

Practices that may be inconsistent with the membership policies of Alpha Phi Omega, depending on the facts and circumstances of each, include restrictive formation, dress requirements, and the manner in which pledges are addressed.

Examples of practices that do not meet this standard include:

- 1) *subjection to physical mistreatment such as road trips, kidnapping, paddling, branding, beating, forced activity, or confinement of any kind;*
- 2) *participation in activities not directly related to their preparation for active membership such as physical conditioning or personal services for active, advisory, alumni, or honorary members;*
- 3) *participation in activities that restrict such normal social functions as eating, social contacts, or personal hygiene;*
- 4) *subjection to mentally or emotionally stressful situations as an integral part of their pledge activities;*
- 5) *blindfolding, except as part of the Pledge or Initiation Rituals; and*
- 6) *subjection to informal ceremonies, traditions, rituals or initiations that are contrary to the policies or National Bylaws of Alpha Phi Omega.*

Of course, enumeration of these specific activities does not imply that all other practices are consistent with the membership policies of Alpha Phi Omega. All membership activities and pledging requirements must be measured against the criteria set forth in this membership policy.

- G) Active members are responsible for maintaining chapter membership practices involving any members of the Fraternity, including actives, in strict accordance with the policies of Alpha Phi Omega and its stated purpose in keeping with the principles of the Boy Scouts of America.
  - H) Advisory, honorary and alumni members of Alpha Phi Omega participate in supporting, but not dominating, roles to active chapters, enabling the active chapters to fulfill the purpose of Alpha Phi Omega. It, therefore, is not the function of members other than active members to direct the supervision of pledges or to direct the establishment of pledge or active member programs and policies in any chapter.
  - I) Chapters, interest groups and petitioning groups of Alpha Phi Omega National Service Fraternity shall not use or condone the use of alcoholic beverages as part of their membership recruitment "rush" or pledge education programs. A violation of this policy shall be deemed a violation of the membership policies of Alpha Phi Omega.
- IV. **Enforcement:** The Fraternity, through its Board of Directors, shall take appropriate action when inconsistencies or infractions of membership policies occur.



# Appendix D: Sample Bylaws

## ***Bylaws of an Alpha Phi Omega GEOGRAPHIC Alumni Association***

Originally drafted by \_\_\_\_\_  
Ratified on \_\_\_\_\_ with/without revisions  
Last amended \_\_\_\_\_

### **ARTICLE I. NAME**

The name of this organization shall be \_\_\_\_\_.

### **ARTICLE II. PURPOSE**

To assemble an association composed of alumni of the Alpha Phi Omega National Service Fraternity residing in the general geographic location of \_\_\_\_\_ and outlying areas, said group being formed for charitable purposes in the \_\_\_\_\_.

### **ARTICLE III. MEMBERSHIP**

Membership in the association shall be open to all former active, advisory or honorary members of Alpha Phi Omega National Service Fraternity, without regard to chapter affiliation.

### **ARTICLE IV. CONFERENCES (National, Regional, Sectional)**

It is recommended that at least one member of the association, who is not affiliated with the structure of the Fraternity (as staff or elected official) be in attendance at National Conventions, as well as conferences within the section and region where the association is located. This is not to usurp or attempt to supersede any National Bylaws associated with alumni voting delegates at National Conventions.

### **ARTICLE V. FINANCE**

#### **Section 1. Dues**

Dues shall be reasonable and customary in cost, and the due date shall be set by the Executive Board. Any exceptions to this shall be handled by the treasurer.

#### **Section 2. Donations**

Donations to the association shall be accepted.

### **ARTICLE VI. RELATIONSHIP TO CHAPTERS**

As an alumni association, this organization shall be an independent entity recognized by Alpha Phi Omega National Service Fraternity and shall not be formally linked to any particular active chapter of the Fraternity. At the discretion of the members of the association and the approval of the local active chapters, the association may enter into joint activities with such chapters (such as a service project). Individual members of the association having ties to individual chapters shall be encouraged to, and not restricted from, continuing such ties.

### **ARTICLE VII. ADHERENCE TO NATIONAL BYLAWS AND GUIDELINES**

This association shall observe all applicable articles and sections set forth in the National Bylaws of Alpha Phi Omega National Service Fraternity, with particular emphasis on Article XII – Alumni.

## **ARTICLE VIII. OFFICERS**

The Executive Board shall consist of a president, vice president, secretary and treasurer. Annual elections for all officers shall occur at the January business meeting, with installation of officers to occur at the April business meeting. The lag time is to be used to encourage sufficient transfer of offices from one person to another.

### **Section 1. Duties of President**

The president shall be responsible for presiding over each business meeting, as well as being the authoritative representative of the association (signing documents, contracts, letters, as well as serving as primary spokesperson for the organization in public relations). In addition, the president shall serve as the association's regional alumni council representative.

### **Section 2. Duties of Vice President**

The vice president shall be responsible for assuming all duties of the president, in the president's absence, and performing other such duties as assigned by the president.

### **Section 3. Duties of Secretary**

The secretary shall be responsible for keeping an accurate written record of the proceedings of each business meeting; corresponding with alumni, chapters, the National Office, and other such persons or entities as needed; and arranging the locations of meetings. In addition, the secretary shall ascertain that the meeting is conducted in accordance with parliamentary procedure, keep association property, act as a historian for the organization, and install new officers following elections. Finally, the secretary shall be responsible for production of any publications, including but not limited to a quarterly newsletter, on a schedule to be determined by the Executive Board.

### **Section 4. Duties of Treasurer**

The treasurer shall be responsible for collecting dues and donations, dispensing funds from the treasury as needed, keeping an accurate financial record of treasury balances and transactions, submitting form 990N to the IRS annually and keeping an archive of all financial contracts and agreements.

## **ARTICLE IX. MEETINGS**

### **Section 1. Types**

The association shall have separate business and social meetings.

### **Section 2. Occurrence**

The first business meeting of each year will be held in January and every third month thereafter. The first social meeting of each year will be held in March and every third month thereafter. The times for the meetings shall be set by the secretary and any changes to this schedule shall be determined by the Executive Board.

### **Section 3. Location**

Meeting locations shall be determined by the secretary.

### **Section 4. Quorum**

Quorum shall consist of two-thirds of members that have paid dues. For the purposes of elections or bylaws amendments, absentee ballots shall be allowed to count towards quorum.

## **ARTICLE X. AMENDMENTS**

An affirmative vote equivalent to three-fourths of the votes cast at a meeting where quorum is present shall be necessary for the adoption of any amendment to these bylaws. Any amendments to the bylaws shall become effective upon the adjournment of the meeting during which said amendments were passed.

## **Bylaws of an Alpha Phi Omega CHAPTER-BASED Alumni Association**

Originally drafted by \_\_\_\_\_  
Ratified on \_\_\_\_\_ with/without revisions  
Last amended \_\_\_\_\_

### **ARTICLE I NAME**

The name of this organization is the \_\_\_\_\_ of Alpha Phi Omega National Service Fraternity.

### **ARTICLE II PURPOSE**

The purpose of the association shall be to promote the principles of Alpha Phi Omega among the alumni members of the \_\_\_\_\_ Chapter. The chapter also will assist the chapter's alumni relations. This association also will attempt to aid the \_\_\_\_\_ Chapter at \_\_\_\_\_ upon request by the chapter.

### **ARTICLE III MEMBERSHIP**

*Section 1.* Membership in this association is open to all alumni, advisory, and honorary members of \_\_\_\_\_ Chapter of Alpha Phi Omega who are duly registered in the National Office. All second semester graduating seniors of the chapter are also eligible for membership in the association.

*Section 2:* All alumni and advisory members of the chapter are eligible to be voting members of the association. Only voting members may hold association office. Only voting members are eligible to vote at association meetings.

*Section 3:* Non-voting members of the association may neither vote at association meetings nor hold association office, but they may attend all association functions and possess association equipment. Honorary members of the chapter, and alumni and advisory members, who have not paid their dues, are non-voting members of the association.

*Section 4:* Membership may be granted to alumni members of Alpha Phi Omega chapters other than the chapter by a majority vote of the voting members present at an association meeting.

*Section 5.* The alumni organization shall not grant any form of membership that does not comply with the above standards.

*Section 6.* The alumni organization shall apply to the National Alumni Relations and Internal Volunteer Development Director for formal recognition.

### **ARTICLE IV OFFICERS**

*Section 1:* The elected officers of the association are a president, vice president, secretary-treasurer, extension chairman, and member-at-large and regional alumni council representative. All of the officers listed in Article IV, Section 1 shall be elected. Other officers, and/or committees are appointed by the president and approved by the elected officers who, when meeting collectively, shall be called the Executive Board.

*Section 2:* The president supervises and represents the association, and sees that its duties and obligations are fulfilled; presides at all association and Executive Board meetings; insures that the alumni operations are in conformity with the principles set forth in the National Bylaws, the Standard Chapter Articles of Association, and these Bylaws; and appoints and removes all non-elected officers and committees, subject

to the approval of the Executive Board. The president is an ex-officio member of all committees. If the president is temporarily unable to carry out these aforementioned duties, the order of succession is listed in Article IV, Section 1.

*Section 3:* The vice president shall be responsible for the duties of the president if the president is absent or unable to perform them. The vice president shall serve as an assistant to the president. The vice president's duties include coordinating alumni reunions and association meetings.

*Section 4:* The secretary-treasurer shall carry out all necessary association correspondence, and shall keep records of all association and Executive Board meetings; receiving and disbursing all association funds and keeping an accurate record of all transactions; reporting on the condition of the association's finances to the president every other month; formulating a budget to be approved by the association; filing all necessary tax forms; and keeping the association's financial records in order.

*Section 5:* The extension chairman shall seek out alumni of the chapter who are presently out of contact with the chapter. The extension chairman shall send to the National Office the updated names and addresses of all such alumni, and shall keep the association informed of all efforts. The extension chairman shall publish a current address list of all chapter alumni once a year and shall distribute it to all voting members who request it.

*Section 6:* The member-at-large shall serve as the association historian, and shall perform tasks asked as requested by the president, Executive Board, or association.

*Section 7.* The officers of this alumni organization shall be elected biennially at the annual meeting and serve for two years. An officer may succeed himself/herself. Nominees do not have to be present at this meeting to run for or hold office.

*Section 8.* This alumni organization shall elect a representative on the Region \_\_\_\_ Regional Alumni Council. Notice of this representative shall be sent to the National Office of Alpha Phi Omega, for notification of the regional alumni representative, region director and National Alumni Chair. The representative may already be serving as a member of the Executive Board.

*Section 9.* It is recommended that the association have brothers fill the offices of newsletter and/or Web site editor, service/fellowship coordinator and active chapter liaison. Their specific duties shall be prescribed at the time of their appointment.

*Section 10.* All officers shall, in addition to their stated duties, perform such duties as their offices or the alumni organization may require.

## **ARTICLE V EXECUTIVE BOARD**

*Section 1:* The Executive Board consists of all current elected officers association, and the chapter alumni secretary. If no alumni secretary has been appointed, the chapter president will serve in that capacity.

*Section 2:* Executive Board meetings are called by the president or vice president. Other members will be given sufficient notice of the meeting. Quorum consists of one-half of the board members.

*Section 3:* The Executive Board may exercise any power of the association in the period between association meetings whenever a question cannot be brought before the association in a timely manner.

*Section 4:* The association may overrule the Executive Board by a majority vote of the voting members present and voting at an association meeting.

*Section 5.* The Executive Board must hold at least two meetings per calendar year. A meeting held at the conclusion of the annual regular meeting, an online meeting or a phone conference meeting are sufficient to uphold this clause.

**ARTICLE VI  
MEETINGS**

*Section 1.* This alumni association shall have one regular meeting per calendar year. The meeting shall be held \_\_\_\_\_ at \_\_\_\_\_.

*Section 2.* Other special meetings shall be called upon the written request of a member, or at the discretion of the Executive Board. Adequate notice of such meetings shall be provided to the organization members.

*Section 3.* A quorum shall consist of any fraction over two-fifths of the voting members, and shall be assumed present unless challenged. No business shall be conducted unless a quorum is present.

*Section 4.* Only voting members shall be allowed to vote at meetings. Proxy or absentee voting shall be allowed for alumni organization officer elections and for unamended bylaw proposals. Nominations sent by proxy must be seconded on the meeting floor.

*Section 5:* The president shall conduct meetings in an orderly manner, using common sense. Use of *Robert's Rules of Order* shall be avoided.

*Section 6:* Any member may appeal the decision of the chair. Such an appeal will be upheld by a majority vote of the voting members present.

**ARTICLE VII  
FINANCES**

*Section 1.* The alumni association dues will be \_\_\_\_\_ per member per year. Any member, who does not submit their dues, shall have their voting privileges automatically suspended until payment is made. A non-dues paying brother may have a voice but no vote on organization matters. Your first dues payment shall be made upon joining the organization. Afterwards, dues are due by the beginning of the Association Meeting.

*Section 2:* The Association shall be run on a nonprofit basis.

**ARTICLE VIII  
SUSPENSION**

*Section 1.* Suspension of a voting member shall require a two-thirds vote at an alumni organization meeting. The suspension charges are to be given to the Executive Board; the brother will then be given an opportunity to answer the charges. The Executive Board will then vote whether to recommend suspension to the alumni organization. Such a recommendation shall be presented at the next regular organization meeting, where the brother under consideration for suspension, shall be allowed to answer the charges filed against him/her. No proxy or absentee ballots are permitted.

**ARTICLE IX  
AMENDMENTS**

*Section 1.* These bylaws may be amended by a majority vote of the voting members of the alumni organization, at a regular alumni organization meeting, provided that the amendment was proposed with sufficient notice to all members.

*Section 2:* Certain sections of these bylaws may be temporarily suspended by a two-thirds vote of the voting members present at an association meeting.

*Section 3.* These bylaws shall become effective upon acceptance by a vote of two-thirds of the alumni present and voting at a regular alumni organization meeting.