



# GUIDE TO ALUMNI CLUBS



**PHI DELTA THETA**  
*Become the greatest version of yourself*

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# ORGANIZATION AND STRUCTURE

## HOW DO WE GET STARTED?

It takes just a handful of alumni to start or rejuvenate an alumni club. Contact General Headquarters, as resources are available for you to utilize. The area province president should also be contacted, as he is knowledgeable of numerous devoted Phis within his province. After these two contacts have been made, you will wish to focus on the local level, and:

1. Form a committee that will oversee the implementation of the initial stages of club formation, including recruitment, developing a mission statement, etc.
2. Elect or appoint officers of the alumni club interest group; president, vice president, treasurer, and secretary.
3. Contact area Phis through a newsletter and/or a telephone campaign, and set a date/location for an initial meeting of interested alumni brothers (usually a one to two hour dinner meeting is appropriate).
4. Submit a petition for charter to the General Fraternity via General Headquarters signed by at least ten alumni brothers residing in your locality.
5. Discover what the interests of the alumni in your area are, and focus on a sales campaign to build your membership ranks.
6. Plan a follow-up meeting that will elect the yearly club officers, adopt a mission statement, develop a calendar of events, designate regular meetings, set goals and objectives for the club, and guarantee the continuation of what has begun.

Discover what the interests of the alumni in your area are, and focus on a sales campaign to build your membership ranks.



## STRUCTURE AND LEADERSHIP ARE THE KEYS TO SUCCESS

While each alumni club takes on a personality of its own, due to its membership base and desired goals, every successful club has several things in common.

- Φ **Elect dedicated officers.** An alumni club's success is directly related to the leadership of the organization. It is important to elect officers who have the time and dedication to devote to the club. It is recommended that each club elect a president, vice president, treasurer, secretary, and several members-at-large who together work as a board of directors or executive committee. You may wish to elect officers separately or as a slate. Sample job descriptions are provided.
- Φ **Provide your club with money in the bank.** A club should not be expected to function without a decent cash flow or on a "pass the hat" basis. Successful clubs rely on, and receive, money from dues from its members. Charging members dues of \$25.00 to \$50.00 is a good start, and additional revenue can be raised through different types of money raising events.
- Φ **Publish an alumni club newsletter.** Sending out a quarterly newsletter to all members of the club. Send the first newsletter of the year to all Phi Deltas in your locality; this issue could have a call for new members, a calendar of events, and a dues request. Utilize postcard mailings for events and special announcements. Keep the information in the newsletter interesting. Good newsletters briefly note General Fraternity news, a calendar of upcoming club events, local alumni notes, the happenings of area undergraduate chapters, highlights of past club functions, etc.
- Φ **Keep an updated membership file.** Between General Headquarters and your local membership directory, you should be able to keep your files updated. The General Headquarters has membership information on Phis in your area, and can provide listings, labels, and spreadsheets with such information. Alumni Clubs can assist the effort by informing GHQ of contact information changes on behalf of members.
- Φ **Utilize the committee structure.** Don't let the major officers do all the work. Utilize members-at-large to steer committees on Founders Day, recruitment, community service, undergraduate leadership, etc. From here new leaders can be groomed.
- Φ **Publicity helps.** Besides your own alumni newsletter, publicize your past and future events in the local papers, area undergraduate alumni newsletters, and *The Scroll*, Phi Delta Theta's international magazine. Get the word out that an active alumni club of Phi Delta Theta is making a difference in your area.
- Φ **Work closely with the local chapter adviser and the area province president.** Consider contacting other alumni clubs for suggestions and ideas.

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# STRONG CLUB OFFICERS MAKE A DIFFERENCE

Rely on a strong board of directors of your club, rather than just an individual, to ensure success. Elect a leadership of Phis who can get the job done.

**President:** This man is a person highly regarded in the club and within the community. The president is responsible for the overall functioning of the alumni club, but relies heavily on his board. He presides over all meetings of the club and provide an agenda for any business meeting held. As president, he is the member who shall introduce guests and dignitaries at any event sponsored by the club. If applicable, he should be the master of ceremonies at club banquets and celebrations. As the official contact for the club, he should provide General Headquarters with the Officers List, regular Alumni Club reports for *The Scroll*, a Founders Day report, a Raymond L. Gardner Alumnus of the Year nomination, a Distinguish Alumnus of Phi Delta Theta nomination, among other alumni-related activities. Above all, it is his duty to ensure that members remain active in the club, and that the club remains active within the locality. He should be grooming his replacement from the beginning.

**Vice President:** This officer will assume the responsibility of the presidency, should the president be unavailable, and maintain direction of all set goals. The vice president should also assist in the execution of the duties of the president, as needed.

**Secretary/Reporter:** This Phi maintains a file of addresses and phone numbers for all area Phi Delts. Upon learning of membership updates, he forwards changes to General Headquarters after updating his personal files. The secretary is responsible for sending all newsletters, invitations, announcements, and additional club correspondence. He works with the president on the submission of reports to the General Fraternity, especially regular updates to *The Scroll*.

**Treasurer:** This Phi coordinates the collection of alumni club dues from members and oversee any club disbursement. The treasurer is responsible for developing a budget for the alumni club and reporting to the club on a regular basis the financial status of the organization.

**Members-at-Large:** These elected officers can serve to oversee committees associated with alumni club recruitment, community service/philanthropy, undergraduate chapter leadership/interaction, event planning, interfraternal activities, educational/professional development, etc.

*Clubs may wish to elect additional officers as deemed necessary.*

“Rely on a strong board of directors of your club, rather than just an individual, to ensure success. Elect a leadership of Phis who can get the job done.”



# PROGRAMMING IDEAS AND HELPFUL REMINDERS

## MEETINGS, FUNCTIONS AND BANQUETS CAN BE INTERESTING AND WELL-ATTENDED

- Φ Offer speakers of an educational or business nature to attract Phis and guests. Look toward your membership, area contacts, and local university for suggestions.
- Φ Ask local chapter presidents to offer a report on the activities of their chapters and members.
- Φ Adopt a local community service undertaking and work with the organization throughout the year; this can act as a great recruitment tool, public relations benefit, positive interaction with an area undergraduate chapter, etc.
- Φ Include family members and friends from events, and even consider having a yearly function exclusively for them.
- Φ Plan your calendar of events well in advance, and publish it in your newsletter regularly. Encourage consistency in meeting date/time/location.
- Φ Be financially sound. Have money in the bank from dues, assessments for special functions, and fundraising efforts.
- Φ Welcome new members to the area and be sure to notice any new faces at your events.
- Φ Partner with another local social or community organization.
- Φ Be creative with your functions: host dinners at unique restaurants, private clubs, schools, or homes; sponsor a picnic or beach gathering for Phi Delt families; have a Sunday brunch; organize a local softball team; sponsor interfraternal events; host a golf tournament; join a bowling league; have monthly card games; note official Phi Delt hangouts for spontaneous get-togethers; and more.
- Φ Get involved with the local undergraduate chapter. Work as a group to advise, assist the undergraduate recruitment effort, offer summer jobs or internships, assist with career planning, send speakers/representatives to chapter meetings, attend their recruitment and alumni events, take part in their community service projects, award academic excellence, etc.



- Φ Founders Day: The perfect opportunity to recognize Silver (25 year) and Gold (50 year) anniversaries, and Palladian (55, 60, 65, 70, and 75 year) members, as well as other alumni of note. Guest speakers attract a wider audience.
- Φ Use *The Scroll*, social media, Submit News at [phideltatheta.org](http://phideltatheta.org), and area newspapers to promote your club and its events before and after they occur.

 [phide.lt/GoodNews](http://phide.lt/GoodNews)

## HOW TO SUBMIT GOOD NEWS

For submission to the alumni news section of *The Scroll*, monthly email *The Scroll Extra*, our social media channels, or the website, please visit [phide.lt/GoodNews](http://phide.lt/GoodNews) with the following:

- Φ Digital, high resolution photographs. Digital photos should be taken on a digital camera's highest-quality setting and be at least 2.5 mb in file size. Photos may be edited for reproduction quality. *We cannot use photos originally posted to Facebook/Instagram due to poor resolution and compression.*
  - Φ Please identify the people in the photo.
  - Φ Please identify all alumni and report by including college and class year.
- Φ Do not send photographs that include promotion or consumption of alcoholic beverages. These photos will be rejected.
- Φ Due to space constraints, the submission may be shortened or edited for clarity.
- Φ Please include:
  - Φ Name
  - Φ Email
  - Φ Contact person's phone number
- Φ Deadlines: Spring/Summer issue is April 1; Fall/Winter issue is October 1.

Any questions may be directed to Editor of *The Scroll* and Engagement Coordinator Kelly Derickson at [kderickson@phideltatheta.org](mailto:kderickson@phideltatheta.org) or 513.280.6706.



## GENERAL HEADQUARTERS ASSISTANCE

The General Headquarters is ready to assist with your efforts. GHQ can help you build your alumni club in the following ways:

- Φ Providing membership information for Phis in your area. Directory listings are available by request. Name, chapter, Bond number, initiation date, year of graduation, address, and phone number can all be provided. Information provided is confidential and supplied upon requests for club use only.
- Φ Assisting with the implementation of a well run and well attended Founders Day celebration. Planning early for this event is very important. Coordinating the location, getting the word out, and preparing the program are all aspects we can review with your club officers.
- Φ Aiding in the search for a speaker for Founders Days, anniversaries and other major alumni events. Members of the General Council, General Officers of the Fraternity, past members of the General Council, and representatives from the General Fraternity/Foundation are all excellent possibilities. The General Fraternity would pay the transportation costs associated with sending a General Council member, General Officer, Past President of the General Council, or General Headquarters representative to an alumni club event that warrants such an appearance (**at least fifty alumni attending**). This General Fraternity representative should be the keynote speaker, and the host club is expected to cover local expenses, such as the banquet meal and lodging.
- Φ Keeping clubs involved and informed with the General Fraternity and other Phi Delt alumni clubs through *The Scroll*.
- Φ Providing Silver Legion, Golden Legion, and Palladian information for specific chapters and localities for the reason of honoring these Phis on reaching these respective milestones. The Foundation mails Golden Legion certificates complimentary to eligible Phis for whom we have valid mailing addresses. Recognition pins can be purchased at a small cost through the [PhiDeltStore.com](https://PhideltStore.com). Ceremonies for these celebrations, as well as the alumni induction ceremony and founding ceremony, are also available on the website.







- Φ Making available support materials to clubs at a nominal charge. Name tags, Fraternity flags, song books, recognition certificates, Phi Delt decals, etc. are all available.
- Φ Providing information pertaining to all official Fraternity suppliers and vendors for items such as jewelry, sportswear, watches, travel opportunities, specialty items, and affinity credit cards. See Marketplace on the website: [phide.it/marketplace](http://phide.it/marketplace)
- Φ Supplying ideas and examples for newsletters, invitations, alumni events, and other alumni club endeavors.
- Φ Continuing the educational opportunities associated with your membership through programs at the Kleberg Emerging Leaders Institute and General Convention.
- Φ Recognizing the achievements of alumni club members and alumni clubs, through acknowledgment in *The Scroll*, the Raymond L. Gardner Alumnus of the Year Award, the Hoysgaard Alumni Club of the Year Award, the Phi Delta Theta Distinguished Alumnus Awards, and Legion of Honor/Merit Medals.

**Contact information:**

**Phone:** 513.280.6706

**Fax:** 513.523.9200

**Website:** [www.phideltatheta.org](http://www.phideltatheta.org)

[phide.it/ceremonies](http://phide.it/ceremonies)

[phide.it/marketplace](http://phide.it/marketplace)

[phide.it/newsletters](http://phide.it/newsletters)



# PHI DELTA THETA

*Become the greatest version of yourself*

Greetings,

Each alumni club of Phi Delta Theta that is in good standing is entitled to a vote during the General Convention, per the Code of Phi Delta Theta. An alumni club is described to be in good standing when:

Section 71. *Alumni club dues to General Fraternity.* During the fiscal year beginning July 1, each alumni club shall pay to the General Fraternity annual dues of twenty-five dollars (\$25.00)

Section 73. *Meetings.* Every alumni club shall meet as often as it may decide but at least three meetings shall be held annually, one each in the fall, winter, and spring quarters. Founders Day shall be observed on or about the fifteenth day of March by each club, either individually or with other clubs.

Section 75. *Delegate to General Convention.* Every officially recognized alumni club which has conducted regularly stated meetings during the college year next preceding a General Convention, and which has paid its annual dues for the preceding biennium, may elect a delegate to the General Convention, who on payment of the regular convention fees, shall be entitled to one vote.

Section 76. *Qualifications of Delegate.* No alumnus member shall represent any alumni club in a General Convention unless he is a member of the club and a resident of the locality wherein it is established, and no active chapter member shall represent any alumni club.

Please complete the checklist on the following page with information regarding your delegate and club status. You may complete the forms and return them to me via mail or fax to 513.523.9200. You may also email the information to Kelly Derickson at: [kderickson@phideltatheta.org](mailto:kderickson@phideltatheta.org).

Thank you for your continued support of Phi Delta Theta!

Yours in the Bond,

Steve Good, *Iowa State '04*  
VP of Growth and Communications

**Phi Delta Theta Fraternity General Headquarters**  
2 South Campus Avenue • Oxford, Ohio 45056  
[www.phideltatheta.org](http://www.phideltatheta.org)



# ALUMNI CLUB CONVENTION DELEGATE CERTIFICATION FORM

## 2020 GENERAL CONVENTION: PITTSBURGH, PENNSYLVANIA

The \_\_\_\_\_ Alumni Club has paid its dues for the preceding biennium or the club will pay \$ \_\_\_\_\_ by June 1, 2020 to bring our account current.

The \_\_\_\_\_ Alumni Club, certify that we have held at least three meetings in the July 1, 2019–June 30, 2020 fiscal year, one of which was a Founders Day celebration. Please list date and location below, as well as designate which meeting was the Founders Day celebration.

Meeting #1: \_\_\_\_\_

Meeting #2: \_\_\_\_\_

Meeting #3: \_\_\_\_\_

\_\_\_\_\_ will represent the \_\_\_\_\_ Alumni Club as the voting delegate at the 2020 Convention in Pittsburgh, Pennsylvania. Said delegate is a member of our alumni club and a resident of the locality wherein it is established.

\_\_\_\_\_  
Alumni Club Officer's Signature

\_\_\_\_\_  
Name Printed

\_\_\_\_\_  
Delegate's Signature

\_\_\_\_\_  
Name Printed

**Due by May 1 in a convention year. Please return to:**

**By mail:** Attn: Credentials Committee  
Phi Delta Theta Fraternity  
2 South Campus Ave.  
Oxford, OH 45056

**By fax:** Attn: Credentials Committee  
513.523.9200

**By email:** [kderickson@phideltatheta.org](mailto:kderickson@phideltatheta.org)



## ALUMNI CLUB-ROSTER OF OFFICERS

Alumni Club: \_\_\_\_\_ Year: \_\_\_\_\_

President: \_\_\_\_\_ Chapter, Bond #: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone (h): \_\_\_\_\_ (w): \_\_\_\_\_ E-mail: \_\_\_\_\_

Vice President: \_\_\_\_\_ Chapter, Bond #: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone (h): \_\_\_\_\_ (w): \_\_\_\_\_ E-mail: \_\_\_\_\_

Secretary: \_\_\_\_\_ Chapter, Bond #: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone (h): \_\_\_\_\_ (w): \_\_\_\_\_ E-mail: \_\_\_\_\_

Treasurer: \_\_\_\_\_ Chapter, Bond #: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone (h): \_\_\_\_\_ (w): \_\_\_\_\_ E-mail: \_\_\_\_\_

**If your club has additional officers, please list titles, names, addresses, phone numbers and e-mail accounts of such officers on the reverse side or submit via email.**

Each club is entitled to have the name of one officer printed listed on our website who Phi in your community will contact for information concerning the activities of your club. Ordinarily, the name of the Secretary is used for this purpose. **If it is desired to use a name other than that of the Secretary, please place (S) before the title of the officer to be listed as the club contact. If no (S) appears above, the name and address of your Secretary will be listed as the main contact.**

**MEETINGS:** Please give all necessary details as to the day of the week or month, hour, and place of regularly scheduled meetings. These meetings will also be listed on our website. If no regular scheduled meetings occur, simply list "as called", but make sure to submit special events to us so that we can help promote these occasions through the web and Facebook.

Time: \_\_\_\_\_

Place: \_\_\_\_\_

This report should be submitted following all regular or special elections to: Kelly S. Derickson, Phi Delta Theta Fraternity Headquarters, 2 South Campus Avenue, Oxford, Ohio 45056-1801. By phone 513.523.6345 or fax 513.523.9200 fax or email [kderickson@phideltatheta.org](mailto:kderickson@phideltatheta.org).



# APPLICATION FOR CHARTER

**TO THE HONORABLE, THE GENERAL COUNCIL OF THE PHI DELTA THETA FRATERNITY:**

We, the undersigned members of the Phi Delta Theta Fraternity, having been graduated, or having withdrawn from college, and residing in or near the city of \_\_\_\_\_ in the state of \_\_\_\_\_, most respectfully present to the honorable, the General Council, that, in our opinion there is in this city and vicinity a sufficient number of alumni members to make and sustain a creditable alumni club, and that its establishment would promote the interests and extend the influence of the Fraternity. If this application be granted, we would earnestly endeavor to establish and maintain such a club; and, therefore, we most respectfully petition the honorable, the General Council, to confer upon us a charter, authorizing and empowering us to establish in the said city and state, an alumni club of the Phi Delta Theta Fraternity, together with all the rights, privileges and immunities thereto belonging, and in conformity with the rules and regulations for such cases made and provided.

Signed at \_\_\_\_\_, this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Name In Full	College	Year of Graduation

# FOUNDERS DAY CHECKLIST

## PHI DELTA THETA FRATERNITY

Whether an alumni club or a chapter, Founders Day is the highlight of the Fraternity calendar of events, and this checklist should assist you in your planning and participation.

### FOR CLUBS AND CHAPTERS

- Set a date for Founders Day (note: date does not have to be March 15)
- Appoint a Founders Day committee
- Secure a location for event and catering service, if necessary
- Secure a speaker for the event (Fraternity, academic, civic leaders, etc.)
- Set aside funds for potential cost of speaker lodging and meals, as well as for the printing/mailing of invitations, the program and other miscellaneous costs.
- If speaker engagement requires overnight stay, secure lodging at a nearby hotel
- Request résumé/bio for guest speaker for introductory and promotional purposes
- Contact GHQ for member information for chapter/locality
- Inform other area chapters/clubs with advance invitation; consider requesting participation
- Request Legionnaire and Palladian information for chapter/locality from GHQ
- Personally contact each Legionnaire by phone to extend invitation; follow-up again before the event
- Send out save the date announcements two months in advance
- Post on chapter/club/university website, submit event information for posting on [phideltatheta.org](http://phideltatheta.org) calendar of events and include event information in newsletters
- Send out invitations with RSVP request six weeks in advance; provide mailing address, e-mail address, and phone number for event contact; include location of event and brief schedule
- For save the date and invitations, utilize available e-mail addresses for initial contact and for reminders as the event date approaches
- Utilize the [PhiDeltStore.com](http://PhiDeltStore.com) to order Legionnaire or Palladian pins
- Download [Ceremonies](#) from the Phi Delta Theta website
- If event is in a chapter house, the chapter should submit an Event Planning Form to GHQ
- Connect with guest speaker at least one month ahead of event about travel plans, if any
- Provide speaker with agenda and details on any expectations/requests (speaker topic suggestions, ceremony emcee, alumni or undergraduate awards presentation, etc.)
- Submit write-up and photographs from event to local paper, student paper, and *The Scroll* using the Submit News feature
- Send out thank-you notes to all those who made the event possible

 [phide.lt/events](http://phide.lt/events)

 [PhiDeltStore.com](http://PhiDeltStore.com)

 [phide.lt/ceremonies](http://phide.lt/ceremonies)

 [phide.lt/EPF](http://phide.lt/EPF)

 [phide.lt/GoodNews](http://phide.lt/GoodNews)

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## FOR GUEST SPEAKERS

- Submit updated résumé/bio
- Review Founders Day speaker facts and other material provided by GHQ
- Review/request event schedule of events, including overview of those who will be in attendance (alumni, undergraduates, parents, university officials, etc.)
- Secure travel arrangements, if applicable, and provide details to host club/chapter
- If traveling by air, review airport pick-up/drop-off requirements with host club/chapter
- For General Officers, travel costs within reason will be reimbursed by General Fraternity.
- If engagement requires overnight stay, review lodging information provided by host chapter/club. **Reminder:** the host is responsible for these costs.
- Review with host chapter/club speaker expectations, including suggested topics and other potential duties during event (Founders or Golden Legion ceremony, awards presentation, etc.)
- Submit report and voucher, if applicable, from event
- Inform Foundation of contact with current/potential donors

## REMINDERS

The Phi Delta Theta True Blue Society sponsors the Golden Legion program and eligible honorees qualifying this year (initiated between 1 July 1968 and 30 June 1969) receive their certificates from GHQ in December each year and have been encouraged to attend an event at their chapter or geographically near them.

Phi Delta Theta Headquarters contact person for Founders Days:  
Kelly Derickson, 513-280-6706 or [kderickson@phideltatheta.org](mailto:kderickson@phideltatheta.org)

## TAX FAQS

### **Are alumni clubs covered by Fraternity's insurance policy?**

Alumni Clubs are named insured under our insurance policy, which presumes clubs follow the Fraternity's Risk Management policies.

### **Is a Tax Identification Number (TIN) required?**

It is recommended that a club acquires a Tax Identification Number as a 'subordinate organization' which will enable you to get a bank account and file a simple Form 990 every year (a simple postcard if receipts under \$25k).

### **Is an Alumni Club classified as nonprofit?**

A club must establish its own organization for nonprofit/tax exemption. An alumni club can seek to become a 501(c)(7) organization. Alumni Clubs are NOT under Phi Delta Theta umbrella.

If you have further questions regarding your tax status, please contact Kelly Derickson at [kderickson@phideltatheta.org](mailto:kderickson@phideltatheta.org).



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