

# ALUMNI SECRETARY RESOURCE GUIDE

CHAPTER OFFICER RESOURCES



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# INTRODUCTION

Congratulations on having been selected as your chapter's alumni secretary! You are about to embark upon an experience that is both challenging and personally enriching. The area of alumni relations presents boundless opportunities and unlimited possibilities, so you will only be restricted by the amount of energy you want to invest and the degree of your creativity.

To gain a full understanding of the true meaning of **alumni relations**, we should perhaps take a close look at the individual concerned, the **alumnus**. Just what do we mean by this term? According to *Merriam-Webster*, an alumnus is defined as "one that has attended or graduated from a particular school, college, or institution." A closer look at the word itself indicates that the word "alumnus" derives its meaning from the Latin word *alios*, which means "to nurture," or in effect, "to support and maintain." Herein lies the real meaning of the word and of alumni relations.

Institutions that generate alumni traditionally redirect their attention to those alumni members for the "support and maintenance" of that organization. Phi Delta Theta is certainly no exception. While our undergraduate chapters have been termed the "lifeblood" of the Fraternity, our alumni are undoubtedly the foundation.

**The experience of our alumni brothers and their willingness to assist can provide the continuity which is so important to the chapters' well-being.** In addition to experience and continuity, alumni can provide guidance, employment and career advice, academic assistance, supervision of chapter housing (legal and financial), recruitment leads and assistance during recruitment, assistance when working with university officials, assistance when working with the General Headquarters, disciplinary assistance, special support in emergency situations, practical service (community and business contacts), and of course financial support. *Subsequently, maintaining a strong alumni relations program is essential to the growth and development of your chapter.*

Overwhelmed by the opportunities to enhance your chapter? Relax and be patient. Do not try to build an empire during your term as alumni secretary. Develop a plan, and construct your alumni relations program piece by piece. Remember the words of *The Phikeia Oath*, "I will strive in all ways to transmit the Fraternity to those who may follow after, not only not less, but greater than it was transmitted to me."

The *Alumni Secretary's Manual* is designed to assist you, the undergraduate member or the involved alumnus, in developing the kinds of programming necessary to support and maintain **A Fraternity for Life**.

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# SECTION 1: THE OFFICE OF THE ALUMNI SECRETARY

## DUTIES AND RESPONSIBILITIES

1. Developing and maintaining alumni relations.
2. Ensuring that consistent alumni communication is occurring.
3. Acting as a liaison between the chapter and the alumni house corporation and chapter advisory board.
4. Maintaining biographical and address files on alumni.
5. Acknowledging all gifts and correspondence from alumni.
6. Teaching Phikeias and active brothers about the importance of alumni relations.
  - a. Make sure the alumni feel welcome in the chapter house at all times, whether on an informal visit or at an organized function. Keep reminding the chapter members that the key element to a successful alumni relations program is **personal contact** and that they should greet all unfamiliar faces in the chapter house. Alumni should also be encouraged to attend chapter meetings and come to dinner on an evening set aside for alumni, either once a month or, if at all possible, once a week.
  - b. Schedule, organize and plan joint undergraduate/alumni meetings, banquets, homecoming activities, Founders Day (sometime around March 15) and initiation receptions.
  - c. Maintain an up-to-date biographical and address file on all chapter alumni and other alumni who live in the area. **Please, ensure that a list of the unknown addresses, as well as address changes of your chapter's alumni, is sent to the Phi Delta Theta General Headquarters as soon as possible.** This will aid both your chapter and the General Fraternity in maintaining a high level of alumni communications.
  - d. Preparing and mailing to alumni periodic newsletters which contain information concerning alumni activities and news (70 percent) up-to-date news about the chapter (15 percent), and a portion relating to campus news (15 percent). **At least two newsletters should be published each year.**
  - e. Helping in the identification and recruitment of legacies. Legacies include brothers, sons, nephews, step-sons, grandsons, and close friends of a fraternity member's family.
  - f. Keeping the chapter informed of alumni activities.
  - g. Teaching Phikeias about the alumni relations program, the importance of alumni to the chapter and about the prominent personalities related to the history of the chapter.

## TECHNIQUES FOR THE ALUMNI SECRETARY

1. **Establish long- and short-term goals.** Decide what you want to accomplish and devise a way to achieve your goals. Create a mission statement for your chapter's alumni relations.
2. **Develop an annual calendar or timeline.** List all events, mailings, and correspondence to promote a regular and lasting relationship with your alumni.
3. **Coordinate with the Phikeia Educator to begin a Mentor Program with alumni members and Phikeias or chapter members.**
4. **Keep a folder of correspondence that needs a reply on your desk.** When you have time, write a reply. (All letters, even if it isn't requested, deserve a response.) By having this folder on your desk, others on your committee can write replies as well.
5. **Coordinate alumni gatherings and recruitment functions together.** Nothing can impress prospective members more than a successful alumnus.
6. **Try to learn as many names as you can.** People feel more a part of the chapter if members "know" who they are and use their name.
7. **Invite alumni to your chapter.** Nothing works better than a personal invitation, but don't just leave it open. Be specific. "Mr. Alumnus, why don't you visit for our scholarship dinner next month? We would all enjoy your company!"
8. **Use your chapter advisory board.** The best way to foster a good rapport between a few alumni and brothers is through this board. Communicate often with the board members and if you don't have a chapter advisory board, *start one.*

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9. **Meet your university/college director of alumni relations.** This person can be invaluable for ideas and help if you need it. They get paid to do for the university/college what you have volunteered to do for your chapter.
  10. **Founders Day.** Holding a Founders Day celebration can be as big or an even bigger draw of alumni than homecoming. If you don't currently have one each year, you are missing out on a great opportunity.
  11. **Proofread, proofread, proofread.**
  12. **Be creative.** What can you do to improve your alumni program? Get people excited about your chapter.
  13. **Thank both publicly and privately.** Remember, alumni donate to your school and the International Fraternity in addition to your chapter. Recognize these people in your newsletter and thank them in person.
  14. **Don't send out the same old letter.** Nothing is more boring than a "please come back for homecoming" letter. Make the letter interesting; send a newspaper clipping; don't miss a chance to *transmit* the Fraternity.

## DELEGATION

The delegation of authority is the means whereby you extend your influence and control, and become capable of assuming greater and greater responsibility. **Delegation is the function of organization.**

1. The best way to increase your authority is to delegate it. **To hoard it, is to lose it.**
2. Once you assign responsibility, be sure you delegate the necessary authority to go with it.
3. Always work through channels.
4. Delegate **only** if you have confidence that the member is capable of intelligently handling the power he possesses.
5. Assigning responsibility **does not lessen your responsibility**; it merely gives you a capacity to handle greater responsibility.
6. Clearly define the responsibilities assigned to each subordinate and make this information known to others who work through him.
7. Once you have delegated, **follow-up** to make sure the job is being done. Be careful not to *micro-manage*.
8. Never assign duties to another solely because they are distasteful or unpleasant to you.
9. When you delegate authority over others to a subordinate, be sure to back him up when the authority is questioned.
10. Be quick to straighten out any complaints about a member overstepping his authority. Let every subordinate know just what decisions he has the authority to make.
11. Have decisions made on the **lowest possible organizational level.**

## TIPS ON HOW TO GET THINGS DONE

1. **Plan ahead.** Every moment spent in planning saves three or four in execution.
2. **Write it down.** It helps a great deal to make a plan on paper. Also you can make reminders to yourself and refer if needed.
3. **Don't get caught up in insignificant details.** If you do, you will never find time to tackle the real issues.
4. **Don't procrastinate.** Don't; waste time dreading a pesky job. If it needs to be done, plow into it. Otherwise it will take you twice as long.
5. **Budget your time.** Allot yourself the amount of time you feel you need, with diligent application, to accomplish each task. Do the job carefully and do it well, but don't waste time. Your time habits will become automatic.
6. **Make habits work for you.** Establishing good habits will speed up your routine.
7. **Learn to say "no."** Popularity is a wonderful thing but don't let it lure you away from accomplishing important tasks. When you're busy, excessive social conversation can be a waste of time. Don't let socializing or others, responsibilities waste your time.
8. **Relax and let your mind create.** The well organized person can expect more leisure time as his just reward. Leisure time is a precious commodity.

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# SECTION 2: MODERN ALUMNI TRENDS

## PHASES OF ALUMNI EVOLUTION

### Phase I: ages 21–26

The undergraduate joins the ranks as an alumnus. During this early period, a young alumnus can better identify with the undergraduates than he can with the other alumni. He still knows many of the brothers in the chapter and can go back and feel like part of the gang. Loyalty to the chapter is extremely strong. His major concerns at this stage are finding the right job (*this may take several attempts with different companies*), maybe finding Ms. Right and paying off any school loans. Usually he has very little money that he can donate at this point. A young alumnus may begin to find other activities to get involved, such as Jaycees, Lions Club, racquetball club, etc. By the end of this period, he may have started to slip away from the activities of the Fraternity and into a completely new circle of friends.

### Phase II: ages 26–36

The number of familiar faces among the undergraduate chapter begins to dwindle and disappear altogether. The alumnus walks into the chapter as a stranger and feels out of place. Many more pressing concerns than in the previous phase exist: marriage, family, moving ahead in career, paying off the credit card, braces for the kids, buying the minivan, buying clothes one size larger than the previous year, etc. Other groups start to grab more of the already booked schedule (Shriners, Rotary, Kiwanis, political parties, country clubs, and church committees). Over fifty charitable groups may be soliciting these Phis for their money. Fraternity priority becomes lower and lower and *unless he is drawn back at this stage, he may be lost forever*.

### Phase III: ages 36–56

Most of his family is grown and there is a greater degree of stability in his career and finances. Civic involvement also tends to increase as he is a *pillar* of the community. Even more groups are asking him for time and money. Sons or daughters begin to attend college and want information on Greek life; alumni parents may test their *alma mater*. Letters from the chapter are received occasionally and shouldn't always be accompanied with a request for money. They now celebrate twenty-five years of being in Phi Delta Theta and are awarded the Silver Legion.

### Phase IV: ages 56 and over

Alumni offspring are having their own kids. An alumnus is secure in his job and may have thoughts of retirement. *Now that he is in the highest tax bracket, the undergraduate chapter cannot provide any write-offs or tax benefits*. He and his wife begin to take their dream vacations. His fiftieth Anniversary of membership in the Fraternity is celebrated with the awarding of the Golden Legion. He reads editorials on "Are fraternities and sororities appropriate for the students of today?"

## TEN SURE WAYS TO KILL ALUMNI SUPPORT

1. Never publish an alumni newsletter.
2. When you do publish a newsletter, only include chapter news.
3. Ask for money every time you make contact with the alumni.
4. Never acknowledge or follow up on recruitment recommendations.
5. Ignore any alumnus who comes to visit the chapter house.
6. Don't bother to clean up the chapter house when alumni are expected to visit.
7. Plan any and all alumni functions one to two weeks in advance, at most.
8. Never acknowledge any financial contributions.
9. Spend alumni's financial gifts, which were directed towards a chapter house renovation project or scholarships, on the spring social.
10. Always think of alumni only in terms of "What can they do for us?"

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## TEN WAYS TO BUILD A TRADITION OF LOYAL ALUMNI

1. **Make the alumni feel welcome.** In two ways: while they are visiting the chapter house and when they receive communications from the chapter. *Never ignore alumni* when they are at the house. Send courteous invitations to all alumni events at least eight weeks in advance of the date and encourage the alumni to return a reservation card.
2. **Make alumni feel needed.** Often there are small tasks and committee assignments which could be made more important by asking an alumnus to help. The alumnus will feel flattered and be happy to participate, especially if it is not a continuing job and doesn't take too much of his time.
3. **Know lots about your alumni.** Accumulate biographical material, but don't limit it to only the alumni who have certain professional, industrial, and educational positions. *All* alumni are important to the chapter. Find out each alumnus' occupation and business address. What are his kids' names? The more you know the better.
4. **Keep your alumni informed about chapter activities.** Produce and mail a chapter newsletter at least two times a year (three is even better). Be sure to illustrate awards and honors gained by the chapter, but don't hesitate to report problems and in depth information on changing campus situations.
5. **Keep the alumni informed about each other's activities.** Use at least 70 percent of the newsletter for news about alumni themselves. Produce and mail a chapter directory once every two or three years. Answer every inquiry, specifically pertaining to a classmate's current address.
6. **Keep your mailing list in good order.** Set up your mailing system so that all incorrect addresses are returned to the chapter house. Write to the General Headquarters or go to the college or university alumni office at least three times a year to find current addresses for any marked *lost*. Apply address corrections and send the previous mailing to every new address as soon as possible after it is received.
7. **Educate the alumni to feel they are an important part of the chapter.** Think of the alumni as members of the chapter. Refer to alumni as current members in the newsletter. Discourage the use of the word "active" when referring to *undergraduate members* as this infers that alumni are "inactive."
8. **Educate the undergraduate members to become loyal alumni.** Through association with the alumni activities, undergraduates should look forward to their future roles in this capacity. Undergraduate members, which include Phi Kappa Phi, often are impressed with alumni expressions of sincere loyalty. A departing senior banquet inducting graduating members into the *alumni association* is a good idea.
9. **When asking for alumni financial support, be sure the finances are for something the alumni will want to provide.** Alumni give generously to support alumni newsletters from which they themselves benefit. They also give generously to well-planned capital campaigns to build new chapter houses when properly motivated by alumni leadership. Alumni will even support an undergraduate scholarship program, but usually cannot be motivated to pay off mortgages, buy new carpeting, redecorate, or other expenditures which should be paid for by rent charged to undergraduates.
10. **Understand the alumni viewpoint.** Alumni have many interests other than their Fraternity. They now have a profession which is probably more taxing than their collegiate studies were. They belong to other professional and social organizations and other activities and have proportionally less time and money for their Fraternity. Be happy with an occasional expression of interest. Encourage this additional interest through the alumni club or association and you will build a tradition of loyal alumni participation.

## THE ALUMNI RELATIONS COMMITTEE

The purpose of the alumni relations committee is to *develop a program designed to strengthen interpersonal and written communication with the chapter's alumni* and other alumni in the area.

### Functions of the Alumni Relations Committee:

1. Develop and implement a **program** designed to improve and enhance the relationship between undergraduates and alumni.
2. Coordinate special **alumni events** with the social chairman and treasurer.
3. Work with the chapter advisory board chairman and the house corporation to **recruit additional alumni** to serve in these capacities.

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4. **Maintain alumni information** files on a computer database or index cards, which include: names, addresses, phone numbers (work and home), birthdays, occupations, anniversaries, initiation dates, undergraduate and national offices held, etc.
  5. Help coordinate the printing and distribution of the **alumni newsletter**.
  6. Work with key alumni to sponsor activities encouraging alumni participation.
  7. Develop "**alumni awareness**" among the undergraduates.
  8. Present **awards** to alumni in recognition of their service to the chapter and to recognize their professional accomplishments.

### **Why have a committee?**

1. **Present awards.** In recognition to alumni of their service to the chapter and to recognize their professional accomplishments.
2. **Size.** A small group is able to work more rapidly, meet more easily, and discuss issues more effectively.
3. **Freedom of discussion.** There is no limitation on the number of speakers or the length of debate.
4. **Select makeup.** Members are chosen for their expertise, ability, and interest in the committee's function.
5. **Training.** Committee membership provides excellent officer training experience.
6. **Involvement.** Committees get the whole chapter involved in fraternity affairs.

### **Duties and responsibilities of a committee member:**

1. Attend all meetings.
2. Participate (share ideas, ask questions).
3. Assume responsibility.
4. Bring new ideas.
5. Be an alert listener.
6. Follow through with tasks on a timely basis.
7. Arrive at meeting prepared and with work done.

### **Duties and responsibilities of a committee chairman:**

1. Arrange meeting times and notify all involved.
2. Ensure committee has established and written goals.
3. Appoint a secretary to record minutes.
4. Know the deadline for completing goals.
5. Be democratic (think/say "we," not "I" or "you").
6. Follow through, coordinate, checkup.
7. Continually evaluate progress toward goals.



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## SECTION 3: ALUMNI PROGRAMMING

The term alumni programming is simply the term that is used for the overall alumni events and correspondence of the chapter. Before looking at the different aspects of a successful alumni program, evaluate your current status in this area.

- What is being done?
- What improvement should or could be made?
- What preparations have been made to carry out the current plan?

With a strong, year-round alumni program the chapter can build healthy relations for the benefit of both alumni and undergraduates members.

### COMPONENTS OF AN OUTSTANDING ALUMNI PROGRAM

1. **Communication:** high-quality alumni-oriented newsletter published regularly, announcements and notices keeping alumni informed of special events, personal acknowledgment and follow-up correspondence.
2. **Alumni/chapter-sponsored activities:** events for all chapter alumni, local alumni regardless of chapter affiliation throughout the year.
3. **Alumni organization structure:** chapter advisory board, house corporation, local alumni club, all with regular meetings with alumni/undergraduate input and participation.
4. **Alumni fundraising:** well-handled annual campaign organized by alumni with chapter's aid, alumni program that pays for itself.
5. **Current alumni information:** updated addresses, updates to General Headquarters, collect biographical information from alumni, alumni directory.
6. **CREATIVITY**

### THINGS TO CONSIDER WHEN PLANNING AN EVENT

Good planning is the key to any successful event. Use the following suggestions as beginning guidelines as you plan your event(s).

1. Appoint an **alumni committee** six to eight months before the reunion date.
2. Conduct committee meetings to decide the elements of the reunion, promotion to be used, speaker and location choices, and assignments.
3. Identify alumni of your chapter or other **main speakers three months before** the event or earlier if necessary to get a featured speaker.
4. **Notify the Office of Alumni Relations** of your plans. See if they will provide additional publicity or promotion in your college alumni magazine.
5. Arrange for a **block of seats at a football or basketball game** or at another special event, using information in promotion, orders placed on reservation card, tickets to be distributed by a welcoming committee.
6. **If spouses/guests are not invited to attend certain events** (ritualistic ceremonies, etc.), arrange for their eating and/or entertainment while alumni are occupied. Put this information in the invitation and program.
7. **Select and reserve the location** for the major event (banquet, picnic, luncheon, dance) if other than the chapter house. **It is good to have some events at the house and others at a different location.** Another location can provide variety, more space, glamour, less restrictions, better parking facilities, etc.
8. Arrange for the issue of your **alumni newsletter before** the reunion, to carry the picture, and biography of the main speaker. Build interest.
9. **Involve as many alumni as possible** in planning, promotion, conduct of reunion, so that reunion events appeal to all members because participation builds interest.
10. **Invite a representative from the university and from the Fraternity's General Headquarters**, prominent ones if the reunion has a special significance such as a major anniversary or a house dedication.

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11. Capitalize on particularly prominent alumni, other dignitaries to be present in publicity before, during and after the event.
  12. **Determine the necessary registration fee** based on anticipated attendance and cost of the meals, beverages, promotion, programs, souvenirs, guest dinners, awards, senior recognition, etc., and the means of collection. All costs should be borne by those attending unless in the early years of establishment of reunion tradition, you want to subsidize the program until attendance builds.
  13. **Recruit and instruct class year presidents to promote the event** by writing personal letters, telephoning former classmates to urge attendance.
  14. **Recruit and instruct key members in major cities** to promote attendance and arrange for cooperative transportation.
  15. Arrange for a **welcoming committee** to supervise registration, signing of the guest book, pinning on name tags, handing out programs, football/basketball tickets and motel registration, etc.
  16. Arrange for a cocktail or social hour (with alternative beverages) prior to the evening banquet, including third-party vendors to serve and entertain.
  17. **Arrange for appropriate souvenir items** or other mementos if it is a special dedication or anniversary reunion.
  18. Arrange for a **golf tournament** or other participant sports, trophies, and advance notice in communication (alumni vs. undergraduates—football, basketball, softball).
  19. **Be sure that all chapter members and Phikeias are aware of the event**, expectations on attendance, and expected participation.
  20. Arrange for a **group picture** of all alumni attending. Mention in advance when the picture will be taken and where.
  21. **Arrange for a write-up of reunion** in an alumni newsletter, scrapbook archives, *The Scroll*, and your institution's alumni news magazine.
  22. If a formal dinner or luncheon is included, arrange for speaker table, welcoming and instruction of a person to be seated there, special instructions on welcoming committee.
  23. Arrange for the **selection and presentation of outstanding alumnus award** if applicable.
  24. Arrange for an **open house**, give both alumni and spouses/guests the chance to tour the chapter house at certain hours during the reunion.
  25. Have the historian **update and clean up the chapter scrapbooks, trophies, composites**, etc. Make an appeal in advance of the reunion for alumni to send mementos which could be displayed in an archives exhibit at the house during the reunion.
  26. **Publicly and privately thank all alumni who have helped.**
  27. At the banquet, allow for some reminiscing. A good idea is to arrange in advance for representatives from different eras to speak about some of their best memories.
  28. Arrange free **babysitting** as a service to younger alumni members.

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## HOMECOMING

Some undergraduates only look at float building and food collections as homecoming and forget all about their alumni members. Too often undergraduates mysteriously disappear when alumni walk through the door. Remember that alumni do not always feel comfortable walking into a house where nobody looks familiar. The changes can sometimes be dramatic (in some cases, it may not even be the same house). It is just like rush—they're looking for acceptance. It's your home now, but it probably wouldn't be there if it wasn't for people like them. Make them feel at ease; put up with their stories about the "good old days" and be genuine. If they can leave feeling special, you've done your job and probably helped to build future attendance at the next sponsored function. If they leave with glowing reports, you can bet they'll mention it to the brother who didn't make it. **It's their weekend . . . make it a memorable one!**

### Tips for a successful alumni homecoming event:

1. Operate a **registration and information desk** inside the front door of the chapter house throughout homecoming weekend. Appoint specific chapter members to be responsible for keeping the desk adequately staffed with a minimum of two men present at all times. This will provide a source for schedules, locations, check-ins, name tags, etc. This will also forestall any new arrivals from feeling neglected or unwanted in rooms full of people who may be strangers.
2. **Ask each guest to register upon arrival.** Among the several reasons for doing this:
  - Your chapter will be provided with a record of who attended as guests.
  - You will accumulate a list of alumni registrants whose names should be published in the next edition of the chapter alumni publication.
  - You will have record of who's back on campus, which many alumni will want to check to spot familiar names.
3. **Assign members specific hours to be on hand in the parking lot.** They can direct traffic, expedite entrance or exit from the lot, and provide a hospitable touch by introducing themselves to all arriving guests.
4. **Charge a nominal cost for luncheons and dinners served to guests.** No alumnus should object to a recovery of costs charge. The charge for the food can be gracefully handled by the sale of meal tickets at the registration desk. Ask each registrant if he and his guests would like luncheon or dinner tickets. Consider posting a neat, temporary sign at the start of the serving line, which reads, Get Tickets for Luncheon and Dinner at Registration Desk.
5. **Do not offset the high costs of entertaining many weekend guests by "passing the hat."** Despite possible generosity of some members in connection with the "charity pitch" of the passed hat, this maneuver will rarely yield as much income as the sale of tickets for meals.

## ALUMNI EVENT COMMITTEES

### Homecoming, Reunions, Anniversaries, and Founders Day

You should put together a committee composed of both alumni and undergraduates to work on the organization and planning of the event. Having alumni involved will provide:

- Ideas on what alumni would like to see included.
- Help in promoting the event.
- Access to resources that you (the undergraduate) might not be able to attain (favors, printing firms, etc.)

You might also consider having an influential alumnus serve as grand chair or honorary chair, as their name will attract others to attend.

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## REUNIONS

Plan a full weekend of activities for a reunion. Consider coordinating reunions for your chapter with those planned by the university/college. You might be able to work with the director of alumni relations at your school to see if you can have the fraternity with the most returning alumni. Remember the reason for having a reunion and plan events accordingly. Homecoming is usually a big draw for younger alumni although older alumni do attend. Another good time to have reunions is to coordinate it with commencement. If commencement is on Sunday, have reunion events on Friday and Saturday. Focus your attention on the *five-year reunions* (fifth, tenth, twenty-fifth, fiftieth, etc.).

- Alumni-undergraduate golf/tennis tournament
- Complete house and campus tours
- Historical slide show
- Founders Processional ceremony
- Initiation ceremony
- Banquet
- Time to meet school officials
- Awards and recognition (*Golden, Silver Legion awards, etc.*)
- Founders ceremony
- Memorial ceremony (if appropriate)

## FOUNDERS DAY

Robert Morrison's birthday, March 15, was established in 1910 as Founders Day. Many alumni clubs and chapters meet on this date to honor the Founding Fathers and celebrate the occasion with all chapter members, alumni, and friends. Obviously it is not always possible to hold large Founders Day events on March 15 every year, but all chapters should hold a special activity on that day. For the Founders Day event, focus around the Founding Fathers of Phi Delta Theta, the founding of your particular chapter, and celebrating our membership in Phi Delta Theta. The **Founding Ceremony** is a moving non-esoteric (non-secret or open) ceremony that highlights the celebration and is appropriate for both members and guests. Usually semi-formal or formal banquets are held and complemented by awards for alumni and undergraduates, speeches, and state-of-the-chapter address. **Silver Legion and Golden Legion ceremonies** are also held during Founders Day celebrations.

## ANNIVERSARIES

A chapter anniversary could be described as somewhat of a Founders Day and reunion combined all into one. Anniversary celebrations are usually held to commemorate the founding of a chapter. Thus these events depend on the year and interest; a one-hundredth anniversary will probably be more appealing than a seventy-third. As with the previous alumni events, take the reason for gathering to heart and plan appropriate events to commemorate them. Sometimes anniversaries can be celebrated at homecoming or a Founders Day. Do not, however, just throw in the anniversary aspect of these events. If you do combine an anniversary with homecoming or Founders Day make extra plans and preparations to do the event justice.

## OTHER POTENTIAL ALUMNI EVENTS

### CHAPTER DINNERS

Chapters should try to hold dinners at least once a month with alumni, their families, and guests invited to attend. The dinner should be held at the chapter house permitting; otherwise, it should be held at some centrally-located restaurant where the price of food and service is nominal. At these dinners, alumni should be special guests and treated as such; be sure to introduce and welcome them. Arrange to have an alumnus or other guest give a brief speech. Consider giving faculty an open invitation to attend these functions as well. Always have the dinners at the same time, making sure that it doesn't start too early or end too late. A wise plan is to hold it on the first Wednesday (or other convenient weekday) of each month. With a regular monthly schedule, invitations are a good formality, but attending the dinner can become a routine for the alumnus and other guests. Coordinating these dinners with the alumni club, house corporation, or chapter advisory board is another excellent idea.

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## INITIATION AND PHIKEIA INDUCTION

Invite alumni to attend the ceremonies, especially those Phis that live in the local area. Send formal invitation cards far enough in advance (six to eight weeks) so alumni can make plans to attend. Ask some to take an active role in the services. Also remember to invite relatives of those members to be inducted or initiated. Send letters to appropriate alumni clubs announcing these events and local interests.

## GOLF TOURNAMENTS

Annual golf or tennis tournaments have become traditional events for many alumni programs. Preceding homecoming or Founders Day luncheons or banquets, they can provide a full day of activities for alumni and their wives. Be sure that all arrangements have been made with the golf course, country club, or university for use of their facilities. Discounts might possibly be arranged for groups or by assisting with officiating or helping to facilitate another tournament. Arrange for babysitting or activities for your alumni's young children or activities for those who choose not to participate in the tournament. Awards for winners are strongly encouraged or possibly care-packages for all participants.

## DIAMOND, GOLDEN AND, SILVER LEGIONS

Members who have been Phis for twenty-five years are inducted into the Silver Legion, and those who have been Phis for fifty years are honored in the Golden Legion. Ceremonies inducting these alumni into the Legions are usually performed at Founders Day celebrations. Each Legionnaire is given a pin acknowledging his years of devotion to the Fraternity. Every five years after becoming a Golden Legionnaire, members are honored as Palladians. **Palladians** receive a charm inscribed with years since initiation, fifty-five, sixty-sixty-five, or seventy. Members who have been Phis for seventy-five or more years are **Diamond Legionnaires**.

## ALUMNI INDUCTION CEREMONY

To commemorate his transition from the undergraduate member to alumni status, a brother can be officially inducted as an alumnus. Most chapters perform this ceremony shortly before graduation with a semi-formal dinner and address by the new alumni members. Upon graduation, draft a letter to both the alumni club of where the member used to live and where he is moving to begin his career.

## FURTHER ALUMNI PROGRAM DETAILS TO CONSIDER

### ALUMNI AWARDS

Please refer to the *Award Chairman's Manual* for more information of these awards: **Diamond, Golden, and Silver Legions, Raymond L. Gardner Alumnus of the Year Award, Distinguished Alumnus Award, Robert Hoysgaard Alumni Club Achievement Award, and the Sam Stone Chapter Advisory Board Chairman of the Year Award.**

### APPROPRIATE DRESS

As you probably already know, many older alumni have a professional attitude when it comes to the dress and manners of modern college men. Often preferring to wear baseball caps and sandals, most undergraduates can be met with some harsh words from their alumni. Take this into consideration when discussing the events at chapter meetings. Ask the chapter to make an effort to dress with these thoughts in mind. Remind the members that a networking opportunity with an alumnus could be lost based on the way they present themselves. *A well-dressed chapter membership is just as important as a clean chapter house.* **Coat and tie** are always recommended for special events.

If the chapter decides not to make the event coat and tie, **business casual** should be the rule. Dressing in this manner would include khaki pants and a dress shirt, polo or golf shirt (knit shirt with collar).

### BANQUET PROGRAMS

For banquets and other dinners, always have a neatly printed program for your guest to read and follow. They can be professionally printed on cards or simply printed on paper and folded. Nonetheless, small details like this make a big impression. Below you will find two types of model banquets and a sample weekend agenda for a reunion.

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# SECTION 4: THE ALUMNI NEWSLETTER

If your chapter does not have an alumni newsletter, get one started. Alumni news is the best and most common form of regular communication between the chapter and the alumni. Since newsletters entail a significant outlay of capital, time, and energy, it would be wise to get the most out of them. The following factors should be considered when planning an alumni newsletter.

## TIMING AND FREQUENCY

Without a regular newsletter, your alumni will lose touch and lose interest in Phi Delta Theta. It has been suggested that an alumni newsletter be published at least two times a year, but ideally three publications would be more appropriate. Visit [phideltatheta.org/members/alumni-newsletters-fundraising/](http://phideltatheta.org/members/alumni-newsletters-fundraising/) to get started.

### MODEL SCHEDULE FOR THREE NEWSLETTERS:

#### August:

Year-end wrap up; homecoming promotion, recruitment recommendation request, new graduate listing, awards received at General Convention or Kleberg Emerging Leaders Institute, new officers, etc.

#### November:

Homecoming highlights, fall recruitment results, promotion of winter/spring alumni function, etc.

#### May:

Alumni function highlights, spring recruitment results, Greek Week, Greek awards, Convention/Kleberg.

## FINANCING THE NEWSLETTER

Financing a newsletter is probably the largest obstacle stopping a chapter from achieving its desired goal in terms of the quality and frequency of distribution. In almost all cases where a chapter does not publish a newsletter, the reason given is lack of funding. This problem has become more serious in recent years with increasing costs of both postage and printing. True, it costs money, but it does not seem unreasonable to request that money be spent for important programs to help maintain a healthy relationship with the alumni members. A chapter can finance a newsletter in the following ways:

- Incorporate it as part of your chapter budget.
- Have your house corporation or alumni fund it.
- Pay for it through money raised in an alumni annual dues program.
- Looking into whether any of the alumni work for, or own, a printing company. *Many times they will do the newsletter for free as a gift-in-kind donation or at a reduced price.*
- A combination of the above.

Keep in mind that your budget will vary depending on the number being mailed, use of pictures and color printing costs, etc.

## NEWSLETTER CONTENT

1. **News** and notes about alumni
2. Alumni **function promotion** (should be announced at least two months in advance in order to be sure the news reaches the alumnus/alumni prior to the event)
3. Alumni **function report** (follow-up article after the function)
4. Lost members list
5. Marriages, children, etc.
6. Recruitment recommendation form
7. **Adviser column**
8. Feature varsity and intramural athletes

9. Feature campus, student government and IFC leaders from the chapter
10. Highlight **Fraternity conferences** such as General Convention
11. Feature **alumni faculty** members
12. Feature a legacy and his relative in the chapter
13. **Feature alumni from certain class years** (especially around reunions)
14. Feature activities like Greek Week and philanthropies
15. Review your institution's alumni magazine to get an idea on the types of articles being written to the general alumni
16. **President's letter** directed to alumni
17. Pictures, pictures, pictures, and **more pictures**
18. List of chapter and alumni officers
19. **Scholarship success** or steps taken to improve it
20. Social and traditional fraternity or college events
21. The **Chapter Grand** (list Phis who have passed away—this information is available from the General Headquarters or college alumni office)

## PRODUCTION OF THE NEWSLETTER

Quality attracts quality. A well-designed, attractive looking newsletter shows that the chapter cares enough to spend time and money to appropriately inform their alumni. It will pay off in the long run in the form of increased alumni interest, participation, dollars, and reputation. Key elements to consider during production: **typesetting, photographs, design, paper, and printing.**

### Typesetting

1. Select format: two, three, or four columns
2. Select type sizes and styles. Suggest that the person in charge of production find a newsletter sample they like and take that to the printer as a format to follow.
3. Proof copy carefully. Eliminate misspelled words and names, and be especially careful with grammar and punctuation.
4. Remember—your printer has done newsletters before so don't be afraid to ask for assistance. The printer can suggest type styles, sizes, layout and design tips, what paper to use, and other useful information.

### Photographs

Good photographs add visual excitement and appeal to a newsletter. Photos should be black and white for best reproduction, although color photos with good contrast will work. Do not use photos that are in poor quality and taste or emphasize alcohol.

### Design

Most chapters can find access to computer programs like Microsoft Word or other versions of word processing and page layout programs to design the newsletter themselves. Recent versions of word processing programs even have a newsletter wizard that can help you layout your publication. Try to get someone in the chapter to do the layout. You can save money and time by doing it in-house. However, many printers cannot render a Word file during printing so check with your printer before starting the layout process. **Adobe InDesign** is the most versatile and productive program for those with experience using them. Here are some design and content issues to be aware of:

1. The **name plate** is the name of newsletter that appears at the top of the front page.
2. **Illustrations** or **photographs**.
3. **Headlines.** Be consistent; use a size anywhere from twenty-four to forty-eight points. Your articles should be either ten or twelve points. Do not include too many different fonts on the same page that the information becomes obscured or confusing.
4. **Captions.** Identify all individuals in the photograph and what they are doing. Try not to state the obvious and give the reader some information that is not apparent in the picture. Large group photos do not always require full lists.
5. **Masthead.** This contains information on the writers, editors, return address, mailing information, etc., usually appearing on the second page.

6. **Paper.** Try to use sixty or seventy pound offset paper—white stock is suggested if you are using photographs.
7. **Mailing procedures.** If you have a *permit number* from the post office you can include it on the newsletter. Be sure to leave space on the back page for this or postage and a mailing label.
8. **Read USPS marketing mail mailing procedures carefully**—if you need assistance contact your alumni office, the General Headquarters, or your local post office.

## THE SUCCESSFUL ALUMNI NEWSLETTER CONTAINS:

1. **Information about alumni activities and a strong invitation for them to attend.** Homecoming, golf days, alumni stags, picnics are given top 'priority' space. Maps, easy to follow, usually accompany such articles.
2. **Information, and pictures, on the previous alumni activity.** This is given top priority. A capsule rundown of the event and the names of all alumni who attended makes for an article which is of interest to alumni.
3. **A precise, capsule form status report of the chapter.** This is incorporated in the "Message from the Chapter President." It should contain the essentials: number of men, number of Phikeias, finances, recruitment projections, major activities, and major accomplishments.
4. **Information and pictures of alumni, their whereabouts, promotions, awards, etc.** *If this area is not included, scrap the whole project.* Nothing is of more interest to more alumni.
5. **Information from General Headquarters which is pertinent to them, as alumni.** Alumni trips, dinners, General Convention dates and site, etc. are but a few examples.
6. **A complete listing of alumni who made financial contributions.** This device encourages future donations, and pleases those who participate.
7. **Information about the college or university which is of interest.** The new football stadium, an alumni association trip to Europe, the addition of a nursing school are a few examples.
8. **A professional 'touch' in layout, design, and printing.**
9. **80 to 90 percent of the available space devoted to alumni-oriented materials.** *A well-done alumni newsletter is vital for a successful program.* It revives and captures the interest of those who have graduated from your chapter. It is what you make it to be—a chapter gossip sheet, or the bridge which transcends the years, the men, and the communication gap.

## DISTRIBUTION

### USPS Marketing Mail

What follows is an abbreviated description of USPS marketing mail procedures. To learn more, visit <https://phide.lt/3hPZ8gc>.

1. **Description:** Special postage rates are available for nonprofit organizations which include fraternities and sororities. Groups must go to the post office to fill out the required paperwork to receive authorization to mail in this manner.
2. **Minimum Qualifications:** Each bulk mailing must consist of a minimum of two-hundred pieces or fifty pounds. All pieces in the mailing must belong to the same processing category. For example, all letters, all flats, etc.
3. **Rates:** Check with your post office for the current rates.
4. **Deposit:** Bulk mail may not be dropped into collection boxes or left on a post office receiving dock. It must be deposited during operating hours at a bulk mail acceptance unit at the post office where your permit is held.
5. **Payment:** There are three methods of postage payment for your bulk mailing.
  - Stamp
  - Permit imprint
  - Postage meter
6. **Permit imprint** is the most popular method. In the upper right hand corner of the mailing piece (where stamps are normally affixed) there is, instead, a box with the words "Bulk Rate" or "nonprofit organization" and "U.S. Postage Paid." This permit imprint must also include the name of the city and state where the permit is held, and the permit number. *There is a one-time, nonrefundable fee paid to the post office at the time you apply for a permit number that is to be included in the imprint.*
7. **Labeling:** You must order your labels in zip code sequence to do a bulk rate mailing. As pieces are labeled you must keep them in zip code sequence so that sorting can be done easily.



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8. **Packaging:** A package is a group of mail pieces secured together as a single unit.
    - Face all addresses in the same direction.
    - Secure packages with rubber bands. One rubber band around the girth for packages up to one inch in thickness. Two rubber bands (one around the length/one around the girth) for packages one to four inches. Always band lengthwise first then around the girth.
    - Package size should be no more than a comfortable handful (i.e. four inches)
  9. **Sorting:** Follow these steps in the order given.
    - When there are ten or more pieces to the same five-digit zip code they must be banded into packages. Place a red "D" sticker below and to the left of the address label on the top piece in each package. Then proceed to the next step.
    - When there are ten or more pieces to the same first three digits of the zip code they must be banded into packages. Place a green "3" sticker below and to the left of the address label on the top piece in each package. Then proceed to the next step.
    - When there are ten or more pieces to the same state they must be banded into packages. Place an orange "S" sticker below and to the left of the address label on the top piece of each package. Then proceed to the next step.
    - At this time, if you have several states remaining, with less than ten pieces for any one state, package the pieces for the different states together. Mixed states packages must contain mail for at least two states. Place a red "MS" sticker below and to the left of the address label.
  10. **Sacking:** Once the sorting has been completed; you must place the packages in mailing sacks (available from the post office).
    - If you have 125 pieces (or fifteen or more pounds) packaged to the same five-digit zip code you must sack them together.
    - If you have 125 or more pieces (or fifteen or more pounds) packaged to the same first three-digits they go in the same sack.
    - If you have 125 or more pieces (or fifteen or more pounds) packaged to the same state they go in the same sack.
    - If you have fewer than 125 pieces (and fewer than fifteen pounds) per state, place the packages in a sack labeled "mixed states."

## EMAIL AND YOUR CHAPTER WEBSITE

Through the use of email and chapter websites, we can more effectively and frequently distribute and receive information.

### Email Addresses

Start keeping track of the email addresses of your alumni. Ask for them in your newsletter and chapter homepage. Communicating by these means is fast and often free to students at most universities and colleges. Be sure that when you do receive a message from an alumnus that you reply immediately. Even if you can't answer all his questions, let him know that you received his note and someone is working on the question. Consider establishing a distribution list or listserv. Contact your alumni office at school; they might help you set up a listserv for your alumni.

### Chapter Website

You can use your website much like a chapter newsletter. Be sure to have a section for alumni. It is important that the information on the website be accurate and updated often. Get your alumni in the habit of looking at the web pages. Be aware that anyone can access your website. Only include information that has a legitimate use, personal information on alumni should be closely guarded. You can create a free, customizable website through myPhiDelt, <https://portal.phideltatheta.org>.

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# SECTION 5: FUNDRAISING CAMPAIGNS

## ORGANIZING A SUCCESSFUL FUNDRAISING CAMPAIGN

As a general rule, **undergraduates should not solicit contributions from alumni.** Most undergraduate officers remain in office for six to twelve months. The officers have usually changed before the solicitation program has had a chance to become fully operational.

An alumnus is normally far more apt to contribute if he is solicited by other alumni. Therefore, any plans to solicit an alumnus should be carefully coordinated with the chapter advisory board chairman, house corporation, or alumni board.

**An alumnus must be given sufficient reason to donate.** The Fraternity is just one of many organizations soliciting money from the alumnus, so a plan should be devised utilizing the powerful effect Phi Delta Theta has had on him.

**Do not “over solicit” an alumnus.** Not only will this turn him off, but it will keep him from coming around the chapter house. By the same token, do not let it appear that the only time the alumnus is contacted is when the chapter wants a list of those who have already donated for the year.

1. **An alumnus is not going to give unless he is getting something in return.** Before you start asking for money, decide what you are going to give or what you have already given the alumnus. Some things that might fall into this category include:
  - A handwritten thank you for any attendance, support, and/or contributions.
  - A neat and well presented newsletter with news pertinent to all alumni.
  - A well-planned Founder’s Day celebration.
  - Recognition for a certain number of years in the Fraternity such as the Golden or Silver Legion ceremonies.
  - Responses to all recruitment recommendations.
  - Small gifts such as a plaque, certificate, or Fraternity lapel pin, as an additional thank you for contribution.
  - Politeness and courtesy when alumni visit the chapter house.
  - Recognition in the newsletter for contributions to the Fraternity.
  - A genuine appreciation by the brothers of any and all gifts of time, interest, and money.
  - Most of all, a chapter of Phi Delta Theta that any alumnus can be proud of.
2. **Newsletter contribution coupon:** Include a tear-off form in the newsletter outlining the costs of the newsletter which asks for alumni help to meet these costs.
3. **Alumni directory:** Compile and mail an alphabetical and Bond number listing to all alumni of your chapter. This would be accompanied by a solicitation letter.
4. **Service directory of local alumni:** Contact all local alumni and ask to advertise their business in a directory that would be sent free to all Phis in the area. There would be a charge for the ads.
5. **Phi Delta Theta stock program:** Sell shares for the future of Phi Delta Theta to alumni. The shares are sold for \$25 and, for his donation, an alumnus would receive a stock certificate. For dividends, he would receive a free invitation to the Founders Day Dinner and the knowledge that he has been instrumental in insuring the future stability of his chapter.
6. **Direct solicitations:** Often this is more effective when it is run through the house corporation. Sometimes the best approach is the direct one. Call, write, or visit the alumni and tell them about the chapter’s need for money. Be sure to tell them exactly what it is for.

Once you have decided on a plan, stick with it. Nothing can set a solicitation program back more than failure to follow through on promises. Also, do not run drives simultaneously; they will cancel out each other’s effectiveness, as well as give an appearance of an unorganized chapter to the alumnus. The vast majority of chapters and house corporations are not established in such a manner as to allow for the tax-deductible gift from their alumni. In accordance with current Internal Revenue Service regulations, any solicitation which does not meet the criteria for tax deductible gifts are not deductible as charitable contributions for federal income tax purposes.

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It is a good idea to place all donations in an "Alumni Account." This account is managed by a group of trustees, usually the CAB chairman, an interested alumnus, and chapter president. All alumni contributions are placed into this account unless otherwise specified. The trustees make decisions on allocations of the funds and alumnus can see proper management of his contributions.



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