

ALUMNI SECRETARY HANDBOOK

| | |
|---|--------------------|
| NATIONAL CONTACT INFORMATION..... | INSIDE FRONT COVER |
| INTRODUCTION | 1 |
| RESPONSIBILITIES | 2 |
| PROMOTING ALUMNI ACTIVITIES | 3 |
| DEVELOPING AN ALUMNI MAILING LIST | 4 |
| ALUMNI ASSOCIATIONS | 5 |
| LIFE MEMBERSHIP | 5 |
| CONCLUSION | 6 |
| FORM TO REQUEST ALUMNI INFORMATION | 7 |
| QUESTIONS & ANSWERS FOR LOCAL ALUMNI ASSOCIATIONS | 8 |

INTRODUCTION

Congratulations! You have been elected chapter Alumni Secretary. Your chapter's alumni are an important and special resource. As active members, they dedicated themselves to the principles of Leadership, Friendship, and Service. As alumni, many continue their commitment and may be able to provide additional service to your chapter as advisors, as financial contributors, or as a source of information about your chapter's history.

In this handbook, we are providing some guideposts as you plan your term of office. This booklet will give you a better understanding of your role as the chapter's Alumni Secretary.

As Alumni Secretary, your role is to keep your chapter's alumni informed and, where appropriate, to get them involved. Remember, it is not your function to force members and alumni to interact. Rather, you can best serve the Chapter by creating and maintaining an environment in which communication between the two groups is encouraged and those relationships strengthened.

It is recommended that during the term of your office you work on creating a supplement to this handbook to assist the future Alumni Secretaries of your chapter. The following information should be included:

- Chapter Bylaws
- Contact information for the current Section Chair, Region Director, and Advisory Chair
- Contact information for any local alumni associations.
- Mailing list of alumni developed during your term.
- Schedule of general events throughout the school year.
- Compile a mailing list of current addresses (postal and electronic) of chapter alumni.

Throughout your service as Alumni Secretary remember that you have chapter advisors and a Sectional Chair (and staff) who are willing and able to assist you. Use their talents and experience.

RESPONSIBILITIES

The responsibilities of the Alumni Secretary are:

- Promote alumni involvement on your campus.
- Serve as liaison between the chapter and alumni, including the chapter's alumni association, and help create an alumni association if one does not already exist.
- Publish a newsletter for alumni, at least annually, which describes chapter activities.
- Supply the National Office with an updated list of alumni and graduating seniors.
- Encourage the Active Members and alumni of your chapter to become Life Members of Alpha Phi Omega.
- Encourage the Active Members and Pledge Members to interact with alumni.
- Work with the Membership Vice President to assure that all records of Alumni are current, and to also develop methods to bring Alumni, Actives, and Pledges together.

PROMOTING ALUMNI ACTIVITIES

Your most rewarding work as Alumni Secretary may be in establishing greater contact with your chapter's alumni and in encouraging their return for campus activities. This will provide an opportunity for them to renew their contact with the Fraternity and for your active members to learn more about the Chapter's past.

Your alumni are a great, untapped resource for the most part. In general your alumni can share with you their perspective on the history of the chapter, serve as a source for potential service projects, and occasionally as a source for financial assistance. Some of the possible events around which you could build this kind of alumni return are:

- National Service Week
- Initiation Ceremonies
- Service Projects and Fundraisers
- Annual Chapter Banquet
- Chapter Anniversary Celebrations
- Campus Homecoming or Reunion weekend

In organizing these activities, keep in mind that alumni may have to be encouraged to participate. They will need as much advance notice as possible, since family and employment commitments often prevent short notice trips.

Part of your effort should be an alumni newsletter. (Don't be frightened by newsletter- the format is not as important as the content.) This should provide information about the chapter's activities as well as news about alumni and the National Fraternity. A calendar of events for the coming school term with contact information is also recommended. Encourage alumni to write when they get married, receive a promotion, or have children. If your chapter has an alumni association, you should enlist their help in publishing the newsletter.

DEVELOPING AN ALUMNI MAILING LIST

In order to communicate with your chapter's alumni, you must have a list of who and where they are. For newer chapters, the development of this mailing list will be relatively easy. Older chapters, especially larger ones, may find this task more difficult.

After gathering whatever information your chapter or college alumni office has on file, the next step should be to contact the National Office and request:

- 1) List of all members registered by the chapter since its founding.
- 2) Computer listing of all initiates for your chapter since 1968 for whom the Fraternity has accurate addresses.
- 3) List of your chapter's Life Members.

There is no fee for the first alumni list request made each year, and only a \$5.00 charge for any additional requests. These lists are available to your chapter on diskette or paper. (Address labels are also available by special request.) Please call or write the National Office to receive an order form. These lists take about 2 weeks for processing and delivery, so please prepare in advance.

After you receive your lists, you can crosscheck the information against that in your chapter's files. You can also check with the alumni office of your college to see what information it has on file about those alumni for whom you do not have current addresses. You might also list some of the missing alumni in your alumni newsletter and ask if anyone knows where they are. After you have found as many of your alumni as possible, you will be able to plan an effective communications program.

Once your alumni list is complete (or if your chapter was fortunate enough to already have one), your job is to maintain it. Once you have completed updating your alumni records, please share this information with the National Office.

ALUMNI ASSOCIATIONS

Alumni Associations have enjoyed a steady growth in recent years. Alumni Associations may be organized as a chapter-based or local Alumni Association. A chapter based Alumni Association is one which restricts membership to Alumni of a particular Chapter, whereas a local Alumni Association is open to all Alumni of the Fraternity, regardless of chapter affiliation that live in the geographical area. You should be your chapter's primary liaison with any Alumni Association in your area. If there isn't such an association, you might want to consider starting one. For further information there is a guide available for *How to Start an Alumni Association* that can be ordered by contacting the National Office or downloaded from the national website at <http://www.apo.org>.

An alumni association should not duplicate the activities of the chapter. Its purpose should be to provide support for the chapter and the Fraternity. Some areas of involvement might include:

- Promotion of the Fraternity
- Other service organizations
- Extension/reactivation of a chapter
- Service on a Sectional or Regional conference
- Assistance at a Sectional or Regional conference
- Fellowship activities
- Sponsorship of a career day/interviewing skills
- Seminars for the active chapter
- Financial assistance to the chapter and Fraternity
- Alumni gatherings at Regional or National conferences.

This list will grow as the association and its members develop activities around their own interests and strengths.

LIFE MEMBERSHIP

Life Membership guarantees a lifetime personal subscription to the *Torch & Trefoil*, the quarterly National Fraternity magazine, and also contributes to the ongoing financial support of Alpha Phi Omega. As active members, you are able to obtain Life Membership at a reduced cost. Encourage both active and alumni members to show their continuing support for Alpha Phi Omega by becoming Life Members. Your chapter should have a supply of Life Membership applications.

CONCLUSION

Your role as Alumni Secretary is essential to an effective chapter. Alumni can be very valuable resources for the chapter. Don't hesitate to take advantage of their personal and professional experiences. Through your leadership and efforts, you have the opportunity to bring together the active and alumni membership of your chapter for the benefit of all.

It should be clear by now that we have not attempted to provide you with an answer to every question, problem, or crisis. Your chapter believed enough in your leadership ability to elect you its Alumni Secretary. To be effective you must share that confidence.

Finally, remember that when your term of office is over, your responsibility to the chapter does not end. You will have learned a great deal about what the chapter expects from its Alumni Secretary and what the chapter needs. When you plan your officer transition retreat, share this information with your successor. Make sure he/she knows you will be around and willing to help.

Alpha Phi Omega

ALUMNI LIST REQUEST FORM

YOUR NAME: _____ PHONE #: () _____

MAILING ADDRESS: _____

CITY/STATE/ZIP: _____

Reason for Alumni List Request: Alumni Association Formation
 Updating Database
 Mailing
 Other _____

INFORMATION REQUESTED: Alumni From Chapter: _____
(Greek Name)
 Alumni Zip Code Range: _____ to _____
 Other (Please Specify): _____

Check **ONE**: Computer Print Out Diskette (please complete information in box below)

1. Format:

| | |
|-----------------------------|--|
| _____ Paradox 5 | _____ Microsoft Excel 3 |
| _____ dBASE III | _____ Text Files (Complete 2&3) |
| _____ Microsoft Excel 97 | _____ Microsoft Excel 4 |
| _____ Microsoft FoxPro 2.0 | _____ dBASE IV |
| _____ Microsoft FoxPro 3.0 | _____ Microsoft Excel 5-7 |
| _____ Microsoft Fox Pro 2.5 | _____ Lotus 1-2-3 WK1 |
| _____ Microsoft Fox Pro 2.6 | _____ Lotus 1-2-3 WK3 |
| _____ Paradox 3 | _____ dBASE 5 |
| _____ Paradox 4 | |

FOR TEXT FILES:

2. _____ Fixed Width _____ Delimited Text

3. Delimiter: _____ Tab _____ Semicolon _____ Comma _____ Space _____ Other

Chapter yearly free list Other Alumni List is \$5.00.

PAYMENT IS DUE WITH YOUR REQUEST!

Return this form to: Alpha Phi Omega (**Please Allow 2-3 Weeks for Delivery**)
National Office
14901 E. 42nd Street
Independence, MO 64055

*****Do Not Write Below This Line*****

National Office Information:

Membership #: _____ Date Received: _____ Shipped: _____

Alumni Lists are the property of Alpha Phi Omega and will only be distributed to members of the Fraternity.

QUESTIONS & ANSWERS

LOCAL ALUMNI ASSOCIATIONS

of

Alpha Phi Omega

National Service Fraternity

1. WHAT IS AN ALUMNI ASSOCIATION?

An Alumni Association of Alpha Phi Omega is a locally oriented, voluntary Association of Alpha Phi Omega Brothers who are duly registered in the National Office as former members of undergraduate chapters. Such a group provides an opportunity for alumni Brothers to extend the program of Alpha Phi Omega. Alumni Association members should not be primarily engaged in a continuing program of formal education. An Alumni Association is an independent group and is not to interfere or come into conflict with the activities of undergraduate chapters.

2. WHAT IS THE DIFFERENCE BETWEEN AN ALUMNI ASSOCIATION AND AN ALUMNI ORGANIZATION?

There is no difference. Some associations, particularly those with a geographic focus rather than chapter emphasis, call themselves Alumni Organizations. Both titles are acceptable.

3. WHAT IS THE PURPOSE OF A LOCAL ALUMNI ASSOCIATION?

The purpose of local alumni Associations is to promote the principles of Alpha Phi Omega among alumni members and the entire National Fraternity. This is accomplished through such activities, as the Alumni Association may deem desirable.

4. HOW IS AN ALUMNI ASSOCIATION FORMED?

A group of interested Alpha Phi Omega alumni decide that they would like to continue being of service and promote the ideals of APO. Initial meetings are held at an announced location, and all known area alumni brothers should be invited and encouraged to participate. Go to the national Fraternity web site (<http://www.apo.org>) and download the brochure "How to Start an Alumni Association" for more information.

5. HOW MANY BROTHERS ARE NEEDED TO FORM AN ALUMNI ASSOCIATION?

There is no required number of brothers needed to register a group as an Alumni Association with the National Office. However, the size of the group will determine what type of projects and events the Association will be able to undertake.

6. WHO MAY BE A MEMBER OF AN APO ALUMNI ASSOCIATION?

Membership in an Alpha Phi Omega Alumni Association shall be granted to:

- A. Persons who are duly registered in the National Office as former members of an undergraduate chapter;
- B. Persons who served as duly registered advisory members of an undergraduate chapter; and/or
- C. Persons granted honorary membership in Alpha Phi Omega pursuant to the National Bylaws. However, honorary members shall not have the right to vote or to hold an office in an APO Alumni Association.

D.

7. HOW CAN ALUMNI BE FOUND?

There are two primary sources of information: the first is the Alumni listings for the area from local colleges and universities; a second source is the Alumni list available by zip code from the Alpha Phi Omega National Headquarters.

8. HOW CAN AN ALUMNI ASSOCIATION OBTAIN THESE LISTS OF ALUMNI?

An agent of the Alumni Association should:

- A. Contact the Alumni Secretary at each local chapter for their list of alumni in the area. It is often helpful to request that the Chapter Alumni Secretary approach their school's Alumni Office for access to their records to verify or help find "lost" brothers.
- B. Write to the National Alumni Chairman, Alpha Phi Omega National Service Fraternity, 14901 East 42nd Street, Independence, Missouri 64055-7347 and request the alumni list based on the zip codes in your Association's area. There is no charge for the first alumni list request made each year and only a \$5.00 charge for any additional requests.

All names obtained should be verified and updated against the telephone directory. Any names that do not appear in the directory should receive further inquiry.

9. HOW IS AN ALUMNI ASSOCIATION ORGANIZED?

Alumni members may organize themselves in several ways including:

- A. Those brothers composed from the alumni base of a single chapter.
- B. All alumni members within a city or specific geographical area.
- C. A combination of the alternatives mentioned above or any other method which alumni may deem desirable.

10. HOW IS AN ALUMNI ASSOCIATION IDENTIFIED?

Geographic area is a desirable method of identifying an Alumni Association. The name of a city or locality in which the group exists is a preferred method, for example, "St. Louis Area Alumni Association" or "North Central Texas Alumni Association". The use of Greek letters is reserved for use by college chapters. As a result, only Associations consisting of brothers from a single chapter would have Greek letters in their names, such as "Beta Rho Alumni Association".

11. WHAT KINDS OF ACTIVITIES ARE RECOMMENDED?

Each Alumni Association should select its activities based on the time and interest of its members. Examples of possible activities include: LEADERSHIP ACTIVITIES like instructing Merit Badge College classes, helping at Leadership Development Workshops (LDW's) or Chapter President Workshops (CPW's) and sponsoring career days; SERVICE PROJECTS like trash clean-ups, creating nature trails, organizing new chapters, and helping reactivate chapters, and/or SOCIAL FUNCTIONS such as camp-outs, vacation trips, canoe trips, picnics, bowling leagues, and attending sporting events.

12. WHAT OFFICES ARE SUGGESTED FOR A LOCAL ALUMNI ASSOCIATION?

Most groups find that they need a President OR Executive Director, Vice Presidents OR Board Members of Membership, Fellowship and Service, and a Secretary and/or Treasurer. A newsletter editor should be elected or appointed as soon as possible to provide an effective means of communication. The number and types of officers will depend on the needs of the individual Association.

13. HOW OFTEN SHOULD WE MEET?

The plan of operations and the nature of the group will determine the frequency of meetings. Regularly scheduled meetings may be semi-annually, quarterly, or monthly, but all meetings should have a purpose. Formal meetings are necessary to formulate and participate in programs; to respond to requests from chapters or Sectional Chairmen; and to determine areas of participation in community activities as involved citizens.

IS A CONSTITUTION NECESSARY?

Yes, each Association should have some formal rules by which it is governed. These should set forth its name, purpose, Association (officers and committees) and operation of general program. The group should also prepare "Articles of Association" to identify it as a voluntary, non-profit Association formed by alumni Brothers of Alpha Phi Omega to further the ideals of Alpha Phi Omega. The rules governing the group may be incorporated in the "Bylaws" and should also contain a provision for amending or revising the document. A set of sample bylaws is attached for your information. They can be tailored to meet the needs of your individual Association. A copy of these rules should be forwarded to: National Alumni Association, Alpha Phi Omega National Service Fraternity, 14901 East 42nd Street, Independence, Missouri 64055-7347.

14. HOW CAN AN ALUMNI ASSOCIATION BECOME RECOGNIZED BY THE NATIONAL OFFICE?

To be recognized as an Alumni Association you must return the official registration form, the names and addresses of officers and members, and the \$15.00 annual fee to the National Office. You will receive a letter of recognition and be informed of your Regional Alumni Representative. This process should be repeated each year by **January 15th** if your Association is to be represented on the Regional Alumni Council.

15. DO ALUMNI PAY DUES?

No, there is no National requirement that APO alumni pay dues, although local alumni Associations can collect dues from their members if they desire.

16. HOW DO THE ALUMNI ASSOCIATIONS SUPPORT THEIR ACTIVITIES?

Each group can vote to collect dues and decide on an amount to sustain their local events.

17. CAN ALUMNI ASSOCIATIONS RECEIVE TAX EXEMPT STATUS?

Yes. Each Alumni Association should contact the Internal Revenue Service for the proper forms.

18. DOES ALPHA PHI OMEGA CARRY LIABILITY INSURANCE ON THE ALUMNI ASSOCIATIONS OR THEIR MEMBERS?

No, insurance coverage is the responsibility of individual alumni brothers. If insurance is needed for an event, individuals would need to contact an insurance agent and seek the necessary event coverage.

19. WHAT IS LIFE MEMBERSHIP?

Life Membership is a one-time contribution (\$100 for alumni, \$50 for undergraduates) which is placed in an endowment fund to help sustain the activities of the National Fraternity.

20. WHY IS LIFE MEMBERSHIP SO IMPORTANT?

Life Membership is important to the National Fraternity because the fees are deposited into the Endowment Fund. Life Membership is important to Alpha Phi Omega alumni brothers because it provides a method of communication after graduation. Life Members receive the Torch and Trefoil upon publication, thus keeping them informed of current APO events, personalities and chapters.

HOW DOES AN ALUMNI MEMBER GET THEIR NAME IN THE ALPHA PHI OMEGA DATABASE?

The best method is to subscribe to a LIFE MEMBERSHIP. The next best method is to forward the following information to the National Office:

Name (and title, if applicable) Chapter where initiated

Street Address Date initiated

City/State/Zip Occupation

When possible, consolidate the above information for all the alumni Brothers in the area and those in your Association, and forward the single report to: Alpha Phi Omega National Headquarters, 14901 East 42nd Street, Independence, Missouri 64055-7347. This best facilitates the data entry process at the National Office.

21. WHAT KIND OF INFORMATION IS AVAILABLE FROM THE COMPUTER?

There are approximately 150,000 individual records in the computer. Individual records prior to 1969 are on index cards or chapter books only. Entries are made as the individual is activated into the Fraternity. For the past 5 years, we have averaged 5000 new alumni members per year. The current alumni membership is approximately 250,000 members. However unless an alumnus is a Life Member, the office probably does not have a good address. The National Office does not have the financial structure to make general mailings to non-life members.

To maintain your relationship with APO, be sure to update your address at the National Office as well as with your undergraduate chapter each time you move.

22. WHAT IS A REGIONAL ALUMNI COUNCIL?

The Regional Alumni Council is the group consisting of representatives from each of the recognized Alumni Associations and alumni members-at-large from within the region. The members-at-large are appointed by the Regional Alumni Representatives to represent the interests of those alumni not affiliated with a recognized alumni association within the region. Primary purposes of the council are to represent the interests of the Alumni within the region, to exchange ideas and to create a form of communication.

23. HOW DOES AN ASSOCIATION PARTICIPATE IN THE REGIONAL ALUMNI COUNCIL?

Each recognized Alumni Association within the region shall have a member on the Regional Council. The members of the council shall act on any business that might come before the council as their Alumni Associations should desire.

24. DO THE ALUMNI HAVE VOTING RIGHTS AT THE NATIONAL CONVENTION?

Yes, one alumni vote per region is authorized through the Regional Alumni Council. This is the result of the National Fraternity's recognition of the contribution made by the alumni to the Fraternity's overall stability.

25. ARE THERE ACTIVITIES FOR ALUMNI AT REGIONAL AND NATIONAL CONVENTIONS?

Yes, traditionally there are seminars and receptions for the alumni brothers so they can get together. Alumni are often asked to draw from their experience and instruct seminars or act as advisors for committees at these conventions.

26. CAN ALPHA PHI OMEGA BENEFIT FROM ALUMNI CONTRIBUTION?

Yes! Both Life Membership and a systematic program of annual voluntary contributions provide a significant means of support to the National Fraternity. Each alumnus is urged to materially support APO by sending an annual contribution.

27. ARE CONTRIBUTIONS LIMITED TO ALPHA PHI OMEGA BROTHERS?

No, unrestricted gifts to Alpha Phi Omega from any source are welcome. Alumni Associations may give as a group if they wish. You can also support the Fraternity by contributing and having your employer provide a matching amount.

28. HOW MUCH SHOULD CONTRIBUTIONS BE?

Contributions of any amount are welcome and appreciated. Each contribution helps sustain the program of Alpha Phi Omega. You may be assured that many brothers will benefit from your generosity.

29. TO WHOM SHOULD CONTRIBUTIONS BE PAID?

Make the check or money order payable to: Alpha Phi Omega, and mail to: Alpha Phi Omega National Office, 14901 East 42nd Street, Independence, Missouri 64055-7347.

30. ARE CONTRIBUTIONS TAX DEDUCTIBLE?

Yes, all contributions made to Alpha Phi Omega are deductible on the Internal Revenue Service Income Tax Report.

Now that you have read the **Questions and Answers Guide**, please contact the National Office or the Regional Alumni Representative in your area for any further assistance. We look forward to having your Association actively participating to promote the principles of Leadership, Friendship, and Service.

