

# ALUMNI RELATIONS GUIDE

## CHAPTER OFFICER RESOURCES



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

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# TABLE OF CONTENTS

## INTRODUCTION

Overview ..... 1  
Objectives ..... 1

## SECTION 1: KNOWING YOUR MEMBERS

Alumni Layers of Interest ..... 2  
    Close Chapter Friendships ..... 2  
    The Overall Chapter and Other Alumni on Special Occasions ..... 2  
    The Institution ..... 2  
Alumni Turn-Ons and Turn-Offs ..... 2  
    Turn-Ons ..... 2  
    Turn-Offs ..... 3  
Alumni Time and Money ..... 3  
Database Management ..... 3  
Database Maintenance ..... 4

## SECTION 2: COMMUNICATING WITH YOUR MEMBERS

Raise Interest and Awareness ..... 5  
Know Your Audience and Utilize All Mediums ..... 5  
    Alumni Newsletter ..... 5  
    Fraternity Magazine ..... 7  
    Fraternity Website ..... 7  
    Alumni Clubs ..... 7  
    Alumni Link ..... 7  
    Events ..... 7  
Other Alumni Programming Worth Considering ..... 8  
Use Your Database ..... 8  
Day-to-Day Actions ..... 8  
Be Creative ..... 8  
Recognizing Outstanding Alumni ..... 9

## SECTION 3: RECRUITING AND WORKING WITH VOLUNTEERS

Determine the Needs and Characteristics of Your Volunteers ..... 10  
Get Their Commitment ..... 11  
    Ask Appropriate Questions ..... 11  
    Communicate Expectations and Individual Board Member Responsibilities ..... 12  
    What Prospective Board Members Should Know and Ask Before Joining the Board ..... 12  
    Prospective Board Members Must Ask Themselves ..... 12  
    Background Materials Prospective Board Members Should Review ..... 13  
Focus ..... 13  
Remember the Keys to a Strong Alumni Board or Group of Volunteers ..... 13  
Keep a Volunteer Profile ..... 13  
The End Result ..... 13  
101 Ways to Create Good Volunteers ..... 14

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# INTRODUCTION

Alumni relations are important to the future of your chapter. An infusion of volunteers into a house corporation or chapter advisory board (CAB) can provide enthusiasm and motivation. It can also make the difference in a chapter's ability to complete a needed project. However, in light of today's climate in which over 2.5 million nonprofit organizations are seeking time, talent, and treasure at a feverish pace, fraternities should adopt a simple strategy—talk to alumni often. If you are not regularly communicating with Phi Delta Theta alumni members (your only constituency), you are missing out on their resources.

While undergraduates and prospective members are often referred to as the lifeblood of the Fraternity, alumni are undoubtedly the backbone. The experience of alumni, and their willingness to get involved, provides the continuity that is so important to our chapters' well-being. The value of the continued assistance they provide is immeasurable to the General Fraternity, local house corporations, and CABs.

The house corporations/CABs that successfully institute and maintain an ongoing alumni relations program show a genuine concern for their alumni members. That concern will be reflected in the interest, involvement, and investment by the group's alumni.

## OVERVIEW

The goal of this manual is to help Phi Delta Theta house corporations/CABs develop effective alumni relations by considering alumni priorities, interests, and expectations. The manual also offers alumni programming tips, along with sample pieces of communication to use when requesting alumni attendance, assistance, or support.

## OBJECTIVES

With the help of this manual, Phi Delta Theta house corporations/CABs will be able to:

- Strengthen their relationship with alumni members by focusing on alumni interests and expectations
- Organize effective alumni events by following proven planning programs and implementing clearly defined roles and responsibilities
- Discuss new alumni programming ideas and opportunities within their chapter

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# SECTION 1: KNOWING YOUR MEMBERS

## ALUMNI LAYERS OF INTEREST

So what are the Fraternity-related interests of most alumni? Imagine concentric circles; these circles can be likened to the various layers of alumni interests. The center circle represents the closest chapter friends of an alumnus. The next circle represents the overall chapter itself, followed by other friends and organizations from the college or university and, finally, the General Fraternity.

Let's take a closer look at these layers of interest:

### CLOSE CHAPTER FRIENDSHIPS

When time is limited, alumni tend to keep in contact with the brothers who are most important to them or with whom they have the strongest friendships. Their connection to these individuals will probably remain stronger than their connection to the overall chapter. Therefore, when you meet an alumnus, be sure to learn about him and find out who are his two or three closest friends in the chapter. When chapters can communicate activities to subsets of brothers who know and like each other, it can serve as a catalyst for more involvement, event participation, and donations.

### THE OVERALL CHAPTER AND OTHER ALUMNI ON SPECIAL OCCASIONS

Even if an alumnus has a chapter close to where he lives, his chapter of initiation will always be a special place for him. After members graduate from college, many find it increasingly difficult to stay in contact with their old friends, but they want to connect with them when they can. If a house corporation/CAB can make this possible, alumni will appreciate their efforts and most likely stay in touch with the chapter.

### THE INSTITUTION

Alumni are proud of their alma mater. Many alumni will look through the alumni update section of their institution's alumni newsletters and magazine to get caught up on the lives of their friends or classmates. Athletic programs, new buildings, academic programs, faculty, and new institutional developments also are of interest to them.

## ALUMNI TURN-ONS AND TURN-OFFS

Remember that alumni are in a different phase of life than undergraduates. Their ideas of appropriate behavior and how things should be done, regardless of how they may have behaved or felt during their college years, will have taken on new perspectives. Following are some hints on understanding alumni:

### TURN-ONS

- A clean chapter house and a respectful attitude towards it
- Adequate notice of events (at least four to six weeks for minor events; three to six months for major events)
- Events starting on time
- Acknowledgments and awards (in-person, by phone, by letter, by email, or by newsletter)
- Old scrapbooks, etc.
- Being invited to and involved with the Ritual
- Contact by other alumni for requests for help/donations (as opposed to contact by undergraduates)
- Improving the image of the chapter, Phi Delta Theta, and the Greek community
- Opportunities to help undergraduates develop
- Pride in being a member
- **Being asked**
- Staying in touch with Fraternity friends
- Making new Fraternity friends
- Enthusiasm of other involved alumni
- Regular communication (newsletter, website, holiday cards, thank you cards, enewsletters, etc.)
- Personal and professional networking opportunities
- Reminiscing about Fraternity experiences

- The opportunity to purchase Phi Delta Theta apparel and memorabilia

- The opportunity to visit casually with chapter brothers

## TURN-OFFS

- Loud music
- Irresponsible drinking
- Last-minute invitations, inadequate notice for events
- Being ignored at chapter events or alumni events
- A request for money, especially if it is the only contact in a long time
- Not being thanked for time or money
- Feeling uncomfortable bringing spouse or children
- Foul language and off-color humor
- Drunken behavior
- Stories or pictures of drunken or other inappropriate behavior
- In-your-face attitudes
- Poor relations between the chapter and the university/college

## ALUMNI TIME AND MONEY

While individual differences always exist, we can draw some general conclusions about the time and money that alumni have available to invest in the chapter.

A typical Phi Delta Theta alumnus may have the following list of priorities:

1. Family
2. Career
3. Religious and church involvement
4. Local community activities
5. Personal leisure
6. Fraternity

If we examine the various age groups of our alumni, we discover the following:

Age	20-25	26-30	31-50	51-60	61+
Disposable Time	25%	10%	5%	25%	75%
Disposable Income	5%	5%	2%	20%	50%

## DATABASE MANAGEMENT

The access to, maintenance of, and control of information is going to determine which chapters are successful with alumni relations and fundraising in the future. In order to ensure your chapter's success, you need to have a database that truly provides you with **insight and information** about your members. *The best way to do this is to exchange information with General Headquarters and the university (alumni and development office).* These groups are likely to receive information about your members. Regularly compare your information to theirs to see whose is the most up-to-date. This should be a win-win partnership as it is likely that your chapter may provide some new data to them as well.

*Remember: you cannot communicate with or solicit members if you cannot contact them.*

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One may wonder what type of data the chapter should maintain on its members. The list below offers suggestions as to what information may be relevant:

- Title (e.g., Dr. or Capt.)
- First name
- Last name
- Suffix (e.g., Jr. or III)
- Home address
- Home phone
- Home email
- Employer
- Job title
- Work phone
- Work email
- Spouse's name
- Anniversary
- Children (how many, names, birthdays)
- Date of birth
- Initiation date
- Chapter offices held
- National offices held
- Interests
- Contact preferences
- Friends in the chapter
- Giving history
- Date file updated

Each of these fields will provide you with insight into this member.

It also provides you with opportunities to communicate with him and provide service to him—a birthday or anniversary card, or a memento celebrating the anniversary of his membership in the organization.

## DATABASE MAINTENANCE

Once appropriate information about your members is collected, keep it current! We live in a very mobile society—people change jobs and home addresses regularly.

*Remember you can receive an update about a member from anyone at anytime.*

When you receive these updates, be sure to add them to the database. Beyond the random updates you may receive from people, the chapter should actively try to maintain and improve its records.

Below are some steps an organization can take to ensure the accuracy of its database:

- Sending out a *minimum of four mailings* per calendar year. If someone has moved, you can receive his new address from the post office. Additionally, one of these mailings should be a profile update to ensure that the information you currently have about the member is accurate. At events, provide an opportunity for alumni to verify their contact information. Print a copy of the database, in initiation year order, and have it available at the check-in table. It will only take the member a few seconds to check his information and that time can be extremely productive. If a member's data is not correct, have him update his information by going to [phideltatheta.org/members/update-your-info/](http://phideltatheta.org/members/update-your-info/). Additionally, the web can be used to track people down—many tools and search engines are available.
- Read national and university publications for news. Also look at local papers.
- Reach out by building a family tree. Have members contact those in the chapter who came before them in their “family line” to build a relationship and obtain updated information.
- If you can't find the person, check with his friends from the chapter. They may have been in contact with him and can provide an update (new address from the exchange of Christmas cards, etc.). Send out a request in your communications for Lost Brothers information updates.
- Spouses of members and parents of members may also have accurate information for many of their husbands' or sons' peers.
- Develop an Alumni Link program.

*Database maintenance must be done **every day**.*

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# SECTION 2: COMMUNICATING WITH YOUR MEMBERS

## RAISE INTEREST AND AWARENESS

Notice that it is called Alumni Relations. There is an “s” indicating that it is a program and a process, not a one-time occurrence. You cannot communicate with a member once and expect that he will automatically participate in or give to your cause. It takes time to build and maintain a relationship. Therefore, your chapter must communicate regularly and often with alumni members. When you develop a coordinated communications plan, remember that in addition to collecting information about your members, you should talk to them about the chapter. Let them know about your current successes and opportunities. Have any members received recognition for anything? Has the chapter received recognition for anything? There is a direct correlation between the **level of involvement** and the **level of giving**. There is also a direct correlation between the **level of awareness** and the **level of giving**. The information you gain from your interaction with members will have a direct impact on your organization’s ability to raise funds.

## KNOW YOUR AUDIENCE AND UTILIZE ALL MEDIUMS

Remember, not everyone likes to receive his information in the same manner. Therefore, use multiple approaches to reach out to your members: mail, email, web, phone, events, face-to-face, etc.

Below are some ways your chapter can communicate with your alumni:

### ALUMNI NEWSLETTER

Don’t underestimate the value of the traditional alumni newsletter. While there are newer and flashier electronic means that you can use to communicate with your members, not all alumni are wired, and some people like the tangible feel of paper in their hand versus intangible electronic communication.

As you are creating the newsletter think of the audience. This publication is primarily for your alumni. Therefore, the newsletter must be of interest to alumni. The newsletter should be full of articles **about alumni**. Two to four times a year, your brothers should open up the mailbox and read the news and comments of *their contemporaries*. Learn more about the services General Headquarters can provide here [phideltatheta.org/members/alumni-newsletters-fundraising/](http://phideltatheta.org/members/alumni-newsletters-fundraising/).

*Remember, in order to ensure that the newsletter is appropriate for the target audience, the house corporation or CAB should maintain oversight of the newsletter and coordinate the activities of the alumni secretary.*

When you share news about the chapter, include a few personal interest stories about current undergraduate members. A story about the accomplishments and future plans of two or three chapter seniors/leaders gives more insight into the status of the chapter than a report on the latest tenth-of-a-point increase in overall chapter GPA. *Alumni want to know what Phi Delta Theta is like today on the campus; show them the product of Phi Delta Theta: its members.*

*Remember an alumnus’ family will also likely read the newsletter. Therefore do not include inside jokes or vulgarity.*

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The objectives of an alumni newsletter are to:

- Help alumni communicate with each other
- Provide chapter updates
- Create a pool of interested and contributing alumni members
- Provide a leadership opportunity for active members to get involved in alumni programming
- Complement chapter fundraising efforts
- Communicate upcoming chapter events and activities
- Introduce the alumni to the undergraduate members
- Show the alumni that the undergraduate members value them

So, how do you make the newsletter relevant to alumni?

- Have both an undergraduate and alumni editor for the newsletter, and be sure that they collaborate.
- Think about what alumni would like to know about the chapter when collecting information. Also consider including bits of information or statistics about the campus that they might not learn from other alumni publications (particularly good as filler material when you need an extra three or four lines to complete a page).
- Establish an Alumni Profile in each issue. Interview an alumnus and write up an interview summary for publication. A human-interest story about an alumnus is sure to be popular.
- Establish an undergraduate member profile in each issue.
- Include an Alumni Update self-addressed reply card or sheet in every issue. This is an easy and excellent way to gather current information about alumni. Consider asking for the following information:
  - Personal news
  - News about other chapter alumni
  - Information they would like to see in the newsletter
  - Internships or career opportunities in their company
  - Names of high school graduates the chapters or house corporation/CAB should contact with college/Fraternity information
- Once you get responses, publish them in a list organized by either last name or year in school. This will make it easier for alumni to find their friends. Keep the responses on file. Be sure also to let General Headquarters know about alumni updates.
- Include a Career Capsules section including brief notes or career tips relevant to alumni. Get content for this section from the campus career center, newspapers, business magazines, and invite alumni to send in their own tips to share.
- Always include a calendar of upcoming events. Remember that most alumni have limited time and need advance notice to plan their participation in university or Fraternity activities. Announce dates for events at least a semester in advance.
- Include some news about general Greek Life activities and trends on campus. Many alumni experienced a different campus environment; help them understand the one in which the chapter currently operates.
- Always include a chapter or officer report section in the newsletter offering brief highlights of significant chapter activities and accomplishments. Include pictures when possible; however, make sure that they all are in good taste.
- Have a Help Wanted section listing ways alumni can support the chapter or get involved.
- Solicit alumni to write brief columns for the newsletter on topics of individual interest or expertise. Include a report from your chapter adviser(s) and the corporation board officers.
- Acknowledge any alumni who have recently donated time or money to the chapter.
- Include home and email address updates provided by alumni. Help them keep in contact with each other.
- Create an email version of your newsletter to send to your alumni, and provide an email address for responses and news from your alumni.



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- Consider putting chapter statistics in graphs and charts (like *USA Today*).
  - Promote alumni participation in upcoming philanthropic activities or mentoring.
  - List contact information for chapter alumni leadership and all members who write articles for publication.

If your chapter does not have an alumni newsletter, get one started. Even if the chapter starts small, encourage them get something out the door every semester. Visit [phideltatheta.org/members/alumni-newsletters-fundraising/](http://phideltatheta.org/members/alumni-newsletters-fundraising/) to get started.

## FRATERNITY MAGAZINE

Many alumni have moved far from their home chapter, or any chapter, and *The Scroll* may be their only contact with the Fraternity. All alumni open the magazine and look for news of their own chapter. Submit ideas to *The Scroll* staff for feature articles on your prominent/interesting alumni. Avoid having an issue of *The Scroll* published without a submission about your chapter. Submit chapter news via the website [phideltatheta.org/members/submit-good-news/](http://phideltatheta.org/members/submit-good-news/) or by emailing the Scroll Editor and Engagement Coordinator Kelly Derickson at [kderickson@phideltatheta.org](mailto:kderickson@phideltatheta.org).

## FRATERNITY WEBSITE

With recent upgrades in technology, the Fraternity website located at [phideltatheta.org](http://phideltatheta.org) features a wealth of information that is easily accessible. Additionally, the new dashboard feature allows an alumnus to view his chapter's current information.

## ALUMNI CLUBS

An alumni club is an organization that functions within a geographic area, typically an area with a high concentration of alumni. The primary purpose of such an association is to provide fellowship for all alumni who reside in that geographic area. In particular regions of the country, Phi Delta Theta men from different chapters gather frequently to enjoy the bonds we all share. These clubs can play an important role in the life of our members, especially when a member is far from his chapter and the alumni club is the only way he can interact with other members.

The alumni club's event schedule presents an opportunity for chapters to provide information about their status and progress. Also, alumni club leaders may choose to organize group support for financial campaigns.

## ALUMNI LINK

In this program, as classes graduate and leave the campus, the members of that class select one brother to serve as the "Link" for his group. The Link is responsible for keeping up with his classmates and reporting address changes and alumni news to the chapter, General Fraternity, and area alumni clubs. The house corporation and CAB can take the lead in enlisting Links for previous chapter eras so that there is an established contact chain for announcing reunions, special events, mentoring needs at the chapter, etc. By communicating with Alumni Links, the chapter is able to promote existing reunions and publications, circulate résumés from the chapter's seniors, solicit recruitment recommendations, and most importantly, promote alumni attendance at Founders Day, initiations, and other key events.

## EVENTS

In addition to reading about each other, alumni like to congregate and socialize. One of the best aspects of fraternity membership is the lifelong friendships that are created. You can help to continue these relationships by providing events at which alumni and their families can spend quality time together. These events do not have to be elaborate, but they should occur at roughly the same time each year. That way alumni can anticipate and look forward to the events.

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Alumni programming involves all of the features required for successful event planning. When done properly, an alumni relations program can:

- Illustrate the value of life-long membership in Phi Delta Theta
- Develop a stronger sense of history for the undergraduate members
- Provide advice and guidance to chapter leaders
- Assist the house corporation or CAB in utilizing alumni resources
- Assist individual members with career counseling
- Create new relationships among undergraduate chapter members and alumni
- Supplement the chapter's recruitment program by providing testimonials
- Provide a well-rounded experience for members
- Keep alumni ready and willing to provide extra financial support when needed

## OTHER ALUMNI PROGRAMMING WORTH CONSIDERING

- Inviting seniors to attend house corporation/CAB meetings
- Arranging for the house corporation/CAB to take seniors to dinner
- Sending seniors to alumni chapter meetings in the area
- Using alumni to influence and encourage other alumni
- Involving past presidents
- Displaying alumni pictures in the house
- One call, one alumnus, one day
- Adopting an alumnus

## USE YOUR DATABASE

Plan your communication. Should you have events in which spouses can participate or have separate events for spouses? Do you need to plan some family activities or provide baby-sitting for children?

## DAY-TO-DAY ACTIONS

What do alumni (and their families) experience if they drop by the house unexpectedly? The condition of the chapter house, the attitude of the members, and any media attention (good or bad) he might know of will affect the impression your chapter makes on an alumnus (and his family). Your behavior will speak louder than any publication you can send them. Further, individuals will tell eight to sixteen people about the experience they had with the members. The chapter must avoid the perception of trouble. *Remember: perception is reality.*

## BE CREATIVE

Your goal is to make everyone want to read what you've sent them or to get them to expect to participate in events. In order to get them to read the letter or mailing, you need to get them to open the envelope. How many of you know when you are receiving something from your organization (labels that look the same, etc.)? Try adding a message to the outside of the envelope to pique their curiosity. Make sure to follow Phi Delta Theta's established brand guidelines and download any needed assets like the logo or coat of arms from the website here: [phideltatheta.org/members/resources/brand-assets/](http://phideltatheta.org/members/resources/brand-assets/).

Try some different forms of communication:

- Have each chapter member pick an alumnus to correspond with for a semester
- Work on tracing the history of your chapter—you can even make it a competition
- Send them handwritten cards that show you care
- Pledge class reunions, five-year reunions, fraternity family reunions
- Use events that are already organized and piggyback off of them, i.e., General Headquarters events and university events

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## RECOGNIZING OUTSTANDING ALUMNI

The house corporation and CAB can never recognize and thank its own alumni enough. Think about what would be most meaningful to the alumni volunteers. Would they want to be recognized at a special event? Would they like to be recognized in the college/university alumni publication? The alumni relations committee should take some careful time thinking about the many ways the chapter can thank alumni for their contributions.

Here are a few to consider:

- **Outstanding Alumni Volunteer:** This can be for an alumnus who contributes time, energy, and talents on behalf of the chapter
- **Outstanding House Corporation Officer:** Specifically for someone who volunteers working with housing issues
- **Outstanding Advisory Board Member:** For individuals serving in advisory capacities
- **Outstanding Committee Member:** For active involvement in implementing and executing specific tasks and responsibilities
- **Contributor Award:** For individuals who do not hold formal leadership positions as alumni but contribute time, money, or expertise on behalf of the chapter
- **Seniors in Newsletter:** Recognize all seniors and a listing of their major and planned professional endeavors
- **Distinguished Service Award:** For long-term service on behalf of the chapter. This may also go to an alumnus who represents the chapter at the national level
- **Inter-fraternity Award:** For an alumnus who contributes to the entire Greek community on campus
- **Hall of Fame Program:** Establish a program to recognize alumni who have achieved significant personal or professional success
- **General Fraternity Awards:** Use the established awards already in place first.

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## SECTION 3: RECRUITING AND WORKING WITH VOLUNTEERS

Alumni offer the potential for maintaining the excellence of a chapter by providing continuity, explaining positive traditions, and offering their experience and guidance for chapter operations. Many have been chapter leaders and can help the undergraduates learn from their successes and mistakes. Their professional experience can translate well into particular chapter advisory positions.

Alumni can provide assistance in planning and carrying out the chapter's alumni communications and activities. They can help with telephone calls, mass mailings, and recruiting other alumni to be involved with the chapter. Alumni can provide experienced supervision of chapter housing, including related legal and financial affairs. Individuals who own their own homes are great resources for house corporation boards. They have the knowledge and experience in dealing with challenging housing maintenance and repair issues, taxes, insurance, etc. Alumni members can also provide special support for the chapter in emergency situations. In order to increase participation of alumni, there are several steps you can take:

### DETERMINE THE NEEDS AND CHARACTERISTICS OF YOUR VOLUNTEERS

- **They want to feel their service is wanted:** Alumni want to feel wanted. They will not readily volunteer their time and efforts if they feel that the chapter does not want them involved. We need to remember to work *as hard recruiting* our alumni as the chapter works for new members.
- **They must feel there is a need:** Alumni want to help the chapter in significant ways. While they may not have a lot of time to donate, they do want to feel like they can contribute in some productive way.
- **Time commitment:** Think back to the time when you ran for a leadership position in the chapter. Or think of the time when an older member started convincing you that you would be an effective leader for a particular chairmanship or officer position. You wanted to know how much time was involved so you could balance your academics, job, relationships with friends, family, other organizations, future job search, etc. Alumni also need to know how much time is involved in their chapter volunteer role so they can balance the competing demands in their lives. How will their involvement affect their time? How much time must they dedicate and for what purposes? Are the other volunteers putting in comparable amounts of time? Does the active organization use its time wisely?
- **Friendships:** Alumni want to enjoy the company of those who are also working on the committee, advisory board, or project. They want to rekindle the interest in the organization and participate in meaningful ways. They will not want their volunteer responsibilities to be a heavy burden in their lives. Are there true bonds of brotherhood being formed in the chapter? Do the alumni and undergraduates reach out to each other? Are the new members included? Do the members of the chapter make an honest effort to get to know and like one another or are there just a bunch of cliques?
- **Structure in which to operate:** They will want to know if there is a committee structure. They will want to know if they have to submit written reports. They will want to know how they fit into the chapter and alumni structure.
- **Competence:** Are the other alumni who are involved doing their jobs? Are they doing them well? Will they be trained properly to do the tasks that they are requested? Is there an open channel of communication to the active organization? To the General Fraternity? What resources can they tap into (which ones are already in place, which ones can easily be developed)? Does the active organization care about its alumni? Is the active organization pulling its weight?
- **Freedom from liability:** America is a very litigious society and our alumni have worked very hard to provide for themselves and their families. They don't want to see everything they have earned disappear. Does the alumni board isolate its members from risk? Are the volunteers covered by insurance? Does the active organization do its share to minimize risk?

- **Ability to influence people:** No one likes to get involved if their opinions or actions will be ignored. If the volunteers don't feel like they can affect change in the chapter, they won't volunteer for very long. Why should they get involved if everything will remain status quo?
- **Information:** What is the situation? How did it get to this state? What has been attempted to improve it? What worked, what failed? Who are the important contacts and how can they be reached? What resources are available? What is the volunteer expected to do?
- **Community:** Do the alumni and undergraduates work together or are they constantly bickering? Is the chapter in good standing with the university? What is the university's (or key university members') opinion of the Greek community? Does the chapter get along and get involved with the other members of the Greek community? How do our neighbors perceive us?
- **Recognition:** Are the volunteers ever recognized and rewarded for the time, effort, and dedication they put in? Does the recognition only come from other alumni or do the undergraduates see the importance of the volunteers?
- **Authority/Power:** If they are put in a situation in which they have to make a decision or reprimand individual members or the chapter, will they have the ability to do so? Will their reprimand have any weight? Will it be backed by the alumni board or active organization?
- **Creativity:** Will this person be doing the same tasks over and over, or will he be able to try new things, or try old things in different ways?
- **Challenge:** How will this person be kept interested? You don't want things to get boring or stale for your volunteers, so try to challenge them and make them rise to the occasion.
- **Advancement:** After a person has served as a volunteer for a period of time, is there room for him on the alumni board? Will he have the opportunity to become a General Officer?

## GET THEIR COMMITMENT

You don't just want time from these people—you want emotional involvement. Our members need to expect the best and should look for it every day. The alumni board and house corporation can exemplify this for them.

To create an effective and committed board, it is important to get the right people. This may be harder than it sounds, as board positions are often used as a reward for active volunteers or offered to the nearest available warm body. Instead, organizations should recruit for expertise and strive for diversity and mix of experience.

## ASK APPROPRIATE QUESTIONS

When recruiting board members, you want to find willing, able, and committed board members. The best way to determine whether or not an individual fits this mold is to ask him questions:

- Why are you interested in the organization?
- Why are you interested in serving on the board?
- Do you have any previous board service, leadership or volunteer experience?
- Are you presently serving on other boards?
- How will the organization benefit from your participation?
- What will you need to make your experience satisfying?
- What kind of time and financial commitments will you be willing to make?
- Can we expect you to come to board meetings regularly?

Many organizations look at how to recruit board members, but often do not look at practical ways to plan transition and succession. Boards should identify the skills needed and existing on the board.

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## **COMMUNICATE EXPECTATIONS AND INDIVIDUAL BOARD MEMBER RESPONSIBILITIES**

It is important to let prospective board members know what will be expected of them and to clarify their roles and responsibilities at the beginning of the recruitment process. Expectations should include that board members:

- Attend all board and committee meetings and functions
- Be informed
- Review appropriate materials prior to meetings and events
- Make a personal financial contribution
- Inform others about the organization
- Suggest potential board nominees

## **WHAT PROSPECTIVE BOARD MEMBERS SHOULD KNOW AND ASK BEFORE JOINING THE BOARD**

- What is the organization's mission?
- Whom does the organization serve?
- Are the organization's members/stakeholders satisfied with the organization?
- How do the organization's current programs relate to the mission?
- Can I observe the programs firsthand?
- Does the organization have a strategic plan that is reviewed and evaluated on a regular basis?
- Is the financial condition of the organization sound?
- Does the board discuss and approve the annual budget?
- How often do board members receive financial reports?
- How is the board structured?
- Are there job descriptions for board members and committee members?
- Are there descriptions of responsibilities/expectations for each committee and the board as a whole?
- Who are the other board members?
- Are conflicts of interest prevented between board members and the organization?
- What are the legal liabilities of board membership?
- Is directors and officers liability coverage provided?
- How do you think I can contribute as a board member?
- How much time is required for meetings and special events?
- How are committee assignments made?
- Is there any board member training and orientation?
- Are there opportunities for continuing board member development and education?
- What is the board's role in fund-raising?
- Will I be expected to make a specific annual financial contribution?
- What role will I play in soliciting donors?

## **PROSPECTIVE BOARD MEMBERS MUST ASK THEMSELVES**

- Am I committed to the mission of the organization?
- Can I contribute the time necessary to be an effective board member?
- Am I comfortable with the approach and tone of the organization's efforts?
- Can I contribute financial support consistent with the organization's expectations of board members with my own means and priorities?
- Can I place the organization's purposes and interests above my own professional and personal interests when making decisions as a board member?

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## BACKGROUND MATERIALS PROSPECTIVE BOARD MEMBERS SHOULD REVIEW

- The organization's annual report
- The most recent audited financial statement
- The long-range program and financial plan
- A list of current board members and titles
- A description of board members' responsibilities
- A board organization chart
- The organization's newsletter and other publications

## FOCUS

As you recruit new board members, think about your real needs and the volunteer's time commitment. Their time is important to them and you do not want to scare them off, overwhelm them, or burn them out. Get the volunteers to do only what you need them to do at first. Don't try to give them too many tasks right away—especially tasks that seemingly have no end in sight. As volunteers complete their tasks and show their effectiveness and proficiency, you can engage them in new ways and increase their participation over time.

## REMEMBER THE KEYS TO A STRONG ALUMNI BOARD OR GROUP OF VOLUNTEERS

- Find out who they are!
- Assess the current makeup of your volunteers
- Orient your volunteers and board members
- Plan for ongoing volunteer efforts
- Involve your volunteers
- Acknowledge and recognize your volunteers and board members.

## KEEP A VOLUNTEER PROFILE

Ask your volunteers to fill out a form so that you will have their information on file. This will help you know who they are and how to contact them.

## THE END RESULT

If you have been diligent in your recruitment process and have asked the appropriate questions and provided the requisite information, your organization will have board members who will demonstrate their commitment to your group. Your board members will be willing to:

- **Be an AMBASSADOR:** help tell your story.
- **Be an ADVISOR:** make effective decisions
- **Be an ADVOCATE:** be roaringly enthusiastic for the organization's mission
- **Provide ACCESS:** help bring and influence others on behalf of the mission
- **Provide AFFLUENCE:** give as much as possible
- **Provide ASSISTANCE:** volunteer for as many activities as possible

## 101 WAYS TO CREATE GOOD VOLUNTEERS

1. Meet them
2. Greet them
3. Orient them
4. Introduce them
5. Appreciate them
6. Acknowledge them
7. Educate them
8. Inform them
9. Enrich them
10. Make them feel welcome
11. Make them feel needed
12. Make them feel worthwhile
13. Make them feel wanted
14. Make them feel interesting
15. Make them feel capable
16. Make them feel talented
17. Make them feel comfortable
18. Make them feel valued
19. Make them feel heard
20. Make them feel helpful
21. Facilitate their learning
22. Offer them assistance
23. Offer them training
24. Offer them your friendship
25. Offer them your help
26. Be prepared
27. Be knowledgeable
28. Be interested
29. Be organized
30. Be open
31. Be receptive
32. Be honest
33. Be non-judgmental
34. Administer wisely
35. Seek their opinions
36. Seek their ideas
37. Seek their biases
38. Seek their knowledge
39. Seek their cooperation
40. Acknowledge their ideas
41. Know yourself
42. Develop your skills
43. Orchestrate skillfully
44. Implement workable suggestions
45. Provide reasons to feel proud
46. Provide growth experiences
47. Provide avenues for accomplishment
48. Provide for public acclaim
49. Provide a chance to socialize
50. Provide support for their efforts
51. Use their skills
52. Use their intelligence
53. Use their motivation
54. Use their enthusiasm
55. Use their offerings
56. Use their time wisely
57. Use their interest
58. Use their capabilities
59. Use their knowledge
60. Provide an opportunity to make friends
61. Let them have fun
62. Show consideration
63. Acknowledge their individual needs
64. Don't abuse them
65. Don't abuse their time
66. Don't abuse their intelligence
67. Don't abuse their friendship
68. Don't abuse their priorities
69. Don't abuse their good will
70. Don't abuse their good intentions
71. Give them a chance to have an impact
72. Give them a chance to demonstrate commitment
73. Offer a listening ear
74. Offer your time
75. Offer your guidance
76. Help them to grow
77. Help them meet new people
78. Help them face new challenges
79. Help them feel involved
80. Help them feel a part of things
81. Help them learn new skills
82. Help them feel significant
83. Help them to become self-directed
84. Help them to understand themselves
85. Help them sort out their values
86. Respect their need to be heard
87. Respect their need to have some control
88. Respect their need to be recognized
89. Respect their need to be praised
90. Respect their need to experience success
91. Respect their need to fit in
92. Respect their need to contribute
93. Respect their need to be acknowledged
94. Respect their need to have a say in decisions
95. Respect their need to prepare for other roles
96. Respect their need to be respected
97. Respect their need to be admired
98. Respect their need to be seen as valuable
99. Develop their leadership skills
100. Recognize them as individuals
101. Believe in them





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