

HOW TO START A CHI PHI ALUMNI ASSOCIATION

STEPS TO SUCCESS

Day 1 – Creating a Guiding Coalition

1. **Form a steering committee** – Even if it's just you and a few other people, form a steering committee. Meet a couple times in an informal setting to determine steps 3, 4, and 5. You will most likely need some funds to promote your group. Consider asking each member of your steering committee to contribute \$50-\$100 towards upstart costs. Printing and postage will be your biggest upfront expenses.

Day 4 – Defining Your Market

2. **Get contact information** – Contact the Chi Phi National Office for the contact information of alumni in your area: 800-849-1824. Know what geographic area (by zip code if possible) you want to market and what format you want the data in (Microsoft Excel spreadsheets are most common).

Day 14 – First Steering Committee Meeting

3. **Set short-term, medium-term, and long-term goals** – Keep your goals specific, measurable, achievable, realistic, and time-bound. You should have 2-3 short-term goals, they should be concerned with the first six months. You should have 4-5 medium-term goals. They might deal with specific numbers pertaining to your membership and should be concerned with the subsequent 6-24 months of your Alumni Association's growth. Long term goals should be concerned with what happens following your Alumni Association's 2 year birthday.
4. **Make a calendar** – Stand in front of a white-board and list everything that you'd like your Alumni Association to do: Monthly happy-hours, holiday banquets, baseball games, Sorority Alumnae Association mixers, career workshops, whatever you want! Remember to keep events alumni-centered, not undergraduate centered. Hold events that encourage your members to bring their spouse and/or children. Don't make them choose between Chi Phi and family. They only have so many hours in a day. Then take those events and throw them onto the coming months of a calendar. Your first event should be at least 4 weeks away in order to give people adequate notice.
5. **Devise a marketing strategy** – Don't just rely on the proven success of paper-mailings. Don't just rely on the innovation of e-marketing. Use both and get creative. The Chi Phi National Office can help e-market your Alumni Association through its electronic mailing software. Postcards are inexpensive reminders to produce and mail (postcard rate through USPS is just 23¢). Make sure you give 4-6 weeks notice about each event and find a way to remind people 4-10 days before the event. Mark drop-dates on your calendar. Consider making a web-

page with basic information about your Alumni Association and a calendar of upcoming events. Contact the National Office to have your page linked to www.chiphi.org.

Day 21 – Marketing Begins (6 weeks from first event)

6. **Begin marketing your first events** – Drop your first marketing piece (whether paper or electronic) no less than 4-6 weeks before your first events. Include no less than 3 upcoming events in each communication to show people that your Alumni Association will have permanence and purpose, and that it's not just a flash in the pan. It will also give them options in case of schedule conflicts. Ask for an RSVP. Give them both an email and a phone number. Make sure people know they can bring guests.

Day 35 – Reminder and Follow-up (4 weeks from first event)

7. **Remind, remind, remind** – Alumni, just like undergraduates need constant reminding. They have professional, family, religious, civic, and athletic commitments. It's easy for them to forget things. If your first communication was electronic, we recommend your follow up be postal, and vice-versa. Again, include reminders about no less than 3 upcoming events in each communication. Ask for an RSVP, and give them both an email and a phone number.

Day 52 – Solicit final RSVPs (7-10 days before first event)

8. **Send a final email** – Send an email reminding those that have already sent an RSVP and those who have not yet done so to communicate their intentions. This should be a short and sweet communication designed solely to serve as a reminder to people. Make sure you include the who, what, where, when, and why of the event. Add parking instructions and directions.

Day 60 – Set up for First Event

9. **The site** – If your first event is being held at a restaurant, pub, hotel, or athletic event, visit the site to figure out how people will know where to go. If you'll need signage or directions, identify what you'll need so you can print it in advance. Make sure the reservations or room arrangements are confirmed and ask the host or concierge to make sure his or her staff knows that there will be a Chi Phi alumni event there and that he or she will know where to direct people. Print an attendance list for people to sign, ask for their name, Chapter, grad year, and email address. Print out several copies of the contact list you received from the National Office.

10. **Get Updated Contact information** – Contact the Chi Phi National Office for updated alumni contact list. Print out 10-15 copies.
11. **Print a Calendar of upcoming Alumni Association Events** – Print a list of upcoming Chi Phi Events that you can hand out at your first event.

Day 63 – First Event

12. **The Event** – All work and no play will make this event boring, so remember that it should be fun! Again, make sure the host or concierge knows where to direct people trying to find “Chi Phi.” You can acquire a Chi Phi Banner from www.spirit.cc and can get Chi Phi handouts, cards, and other memorabilia from the Chi Phi National Office for little or no cost. At a minimum, your event should accomplish steps 13, 14, 15, and 16. Other than that, have fun, relax, and use the opportunity to create camaraderie among your Chi Phi Brothers!
13. **Keep detailed attendance records** – Have people sign the attendance list you printed out a few days ago. Make sure you remind people mid-way through the event to sign in.
14. **Use Your Members To Promote the Alumni Association** – Make this a grassroots effort! Ask for volunteers to contact other alumni by phone and personally invite them to future events. They’ll probably jump at the opportunity to contact guys from “their era at the Chapter.” Distribute the (updated) contact lists that you printed out a few days ago.
15. **Solicit Ideas from the Membership** – Find out what kinds of events others would like to hold and work them into the calendar right then. Show people that their ideas matter and that they will play a role in the formation of the Alumni Association. Find out what other people want out of Chi Phi and help your Alumni Association deliver benefits of membership designed around them.
16. **Elect officers** – Even if it is only for a short term of office, try to find a place for people to get involved. If you don’t have enough people looking to get involved, just elect a President, a Secretary, and a Treasurer. If people are looking to get involved, also fill a Vice-President’s spot, as well as that of a webmaster. Pre-determine what kind of terms officers will serve. Begin talking to people about filling leadership roles down the road.
17. **Don’t get discouraged** – If you don’t get amazing attendance. Work towards small gains from one event to the next. If you get five people to your first event, a 40% growth only means getting two more guys to your next event. If your third event only gets two more guys, then you are already nearing a doubled membership. Work at it. Rome wasn’t built in a day. Build on progress, keep momentum moving, and keep projecting events into the future so people

maintain excitement about the Alumni Association. Before you know it you'll have twenty or thirty people involved.

Day 77 – Remind about Second Event

18. **Keep communication coming** – Show people consistency and that your Chi Phi Alumni Association is here to stay. Send another post-card to remind people about your next three to four events and send an email communication highlighting who attended, and featuring pictures of the event.

Day 81 – Open a Bank Account

19. **Formalize Your Accounting Process** – Task your Treasurer with opening a bank account. You may need a Tax Identification Number to do so. You can get the necessary paperwork at www.irs.gov. Contact the Chi Phi National Office if you have trouble.

Day 84 – Second Steering Committee Meeting

20. **Conduct as Much Business Here As Possible** – Your goal should be to present proposals and suggestions for the review of the general membership. Create a spreadsheet of “members” contact information. Have your Treasurer create a balance sheet of Alumni Association Assets. Print and copy these documents so all you need to do is hand them out.
21. **Review Your Goals** – Go back and review your original short-term, medium-term, and long-term goals. Find out where your group is in its path to become a vibrant, self sufficient and productive Chi Phi Alumni Association. Find out what action items and tasks need to be in place to meet whatever goals you have not yet met.
22. **Review Recruitment Efforts** – Just like a Chapter should be creating a wish list of potential members you too should be actively seeking members into your Alumni Association. Determine who you want to target much the way a Chapter would look for New Members. And remember, potential members need not be Chi Phi alumni in your area. Look for potential members that expand not only the base of your group in quantity, but quality as well.

Day 91 – Second Event

23. **Keep it Fun** – Again, this event should remind people why they joined Chi Phi – for fun and for friendship. Conduct only a minimum amount of business. Try to accomplish that at your Steering Committee meetings.
24. **Propose Skeleton Bylaws** – Get sample bylaws from the Chi Phi National Office. All you'll need to do is insert your Alumni Association's name and some basic

information. Don't worry about making them perfect, you only need to have a starting point. Your Alumni Association will last long enough to perfect them as time goes on.

25. **Adopt a Voluntary Dues Amount** – Have a short discussion with a proposed dues amount. Ask people what they think will be a fair commitment. Consider having one dues amount for “young alumni” (those within 4 years of graduation) and another for those that are more established. Ensure that your Treasurer keeps immaculate financial records.

Day 98 – Third Steering Committee Meeting

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28. **Review Your Calendar** – Spend adequate time discussing whether your events have become the “type” of events that your membership is looking for from the Alumni Association. Continue re-evaluating the type and scope of events that your Alumni Association is providing. Do your best to keep your Alumni Association from becoming to “comfortable” with one type of event. Remember to switch things up, keep it exciting, bring in newer, different speakers or go to newer, different venues.

Day 105 – Remind about Third Event

29. **Keep communication coming** – Send another email communication or postcard reminder. Remember to sing your Alumni Associations praises. Highlight lists of people that have attended your events and include pictures. Talk about potential

Day 129 – Third Event (and subsequent events)

30. **Keep it fun** – Keep it Fun. A typical agenda should be emerging. Introductions followed by business followed by a guest speaker or social activity. Members should be asked at every turn to fill roles of prominence and for their input in

order to maintain involvement and excitement about the Alumni Association.

31. **Always talk about recruitment** – Recruitment efforts should be a constant topic of discussion.
32. **Always have a draw** – You want your Alumni Association to be more than an alumni extension of an undergraduate Chapter. It should be creating its own identity as well. Consider bringing in a different football coach each season, bring in community leaders or elected officials to speak on a topic. Consider asking a local university's career center to help you organize a resume workshop or networking seminar. Think outside the box and don't expect people to come solely to see each other.

One Week after Each Subsequent Event - Communicate

33. **Remind and Communicate Consistently** – Reliable communication in many forms (phone calls, emails, web-page updates, post cards, and letters) will define whether your group maintains an air of excitement and the interest of existing members (as well as whether it gains the interest of new members). Your mailings, emailings, and webpage should have a consistent feel. Further develop your marketing identity through a consistent look and feel. ***Your mailings should run like clockwork.***

Two Weeks after Each Subsequent Event – Steering Committee

34. **Always Review Your Goals** – Keep your group's mindset goal-oriented.
35. **Always Review Recruitment Efforts** – Never let your group be satisfied with its size. A strong Alumni Association will have 80 to 120 active members. It takes time to get there, but a stable membership is key to longevity.
36. **Always Review, Update, and Add to Your Calendar** – Keep your calendar planned for no less than five months at a time. Doing so will allow for enough flexibility to alter your Alumni Associations activities but allow your members to receive enough notice to adequately plan for events.

Cool Ideas for Your Alumni Association

- Start an email list.
- Create a Alumni Association Website
- Contact key community figures or Grand Council officers to come in as guest speakers
- Adopt an official philanthropy