

The image features a dark red rectangular box in the top left corner containing the word "PIKE" in white, serif, all-caps font. The background of the entire page is a light gray line drawing of a crest. The crest depicts a knight's helmet with a plume, a shield with the Greek letters "ΠΚΑ" and a sword, and a banner at the bottom. Radiating lines emanate from behind the crest, creating a sunburst effect.

PIKE

Alumni Association in a Box
First Meeting as a Chartered
Alumni Association

TABLE OF CONTENTS

Additional Resources	3
Sample Meeting Agenda	3
Alumni Association Playbook	4
Alumni Association Sample Annual Calendar.....	5
Alumni Association Sample Dues Structures	6
Alumni Association Sample Newsletters	7
Planning Events	13
IRS Tax Exempt Status FAQ	16
What is our tax-designation?.....	16
What does this mean?	16
What forms is my Alumni Association responsible for filing?	16
Is my Alumni Association at risk of having its exempt status revoked?	17
What happens if our tax exempt status is revoked?	17
AA ACH Authorization Form	18

Resources

Sample Meeting Agenda

Omega Omega Alumni Association

AA Business Meeting

July 25, 2016

5:00 pm | PIKE House

Now that we are an official alumni association of the Pi Kappa Alpha International Fraternity, the goal of this meeting will be to finalize any unfinished business and to review/solidify our goals and annual calendar.

Location

PIKE House
2112 Lincoln Way
Memphis, TN 38117

Agenda:

- Review AA Playbook of best practices
- Review AA Bylaws
- Finalize communication and dues structures
- Review/solidify alumni association goals
- Annual calendar (creation/review)
 - Membership initiatives
 - Communications
 - Events
 - Fundraising goals
- Time/location of next meeting
- Adjourned

Alumni Association Playbook

Click [here](#) to view *The Playbook* on www.pikes.org.

THE PLAYBOOK

STRUCTURE

1. Officer Structure, Election, and Reporting Guide
2. Development Guidelines
3. Association Sample Annual Calendar
4. Association Sample Meeting Agendas

Position Blueprints

Director of Membership Blueprint

Director of Communication Blueprint

Director of Events Blueprint

Director of Fundraising and Philanthropy Blueprint

Alumni Association Sample Annual Calendar

Alumni Association Sample Annual Calendar													
Event/Task	Date												
President	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	
Annual meeting						•							
Host quarterly board meeting			•			•			•				•
International Convention								•					
Vice President	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	
Coordinate chapter update for annual/quarterly meetings			•			•			•				•
Assist four appointed directors as necessary	•	•	•	•	•	•	•	•	•	•	•	•	•
Establish annual calendar for review by the board						•							
Secretary/Treasurer	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	
Payment of annual dues							•						
Complete quarterly financial report for the board			•			•			•				•
Shield & Diamond deadlines for notes	•			•			•			•			
Submission of William R. Nester awards packet					•								
Director of Membership	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	
Sync of membership database with MHQ						•							
Graduating senior luncheon					•								
Add alumni contact information updates to database as necessary	•	•	•	•	•	•	•	•	•	•	•	•	•
Director of Communication	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	
Delivery of alumni newsletter					•								•
Update of website			•			•			•				•
Director of Events	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	
Homecoming festivities										•			
Founder's day banquet			•										
Graduating senior luncheon					•								
Annual Alumni Golf Outing								•					
Director of Fundraising & Philanthropy	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	
Annual update of scholarship						•							
Annual philanthropic opportunity: Habitat for Humanity										•			
PIKE University support for the chapter		•						•		•	•		

Alumni Association Sample Dues Structures

Tiered Dues Structure

This is an extremely simple structure that allows the association to collect administrative funds. These funds can be used to produce communications and offset costs of planning events.

- First year out of college – free
- Two-four years out of college – \$25
- Annual dues – \$50
- Lifetime dues – \$750

Campaign Dues Structure

This structure is more of an annual fund, where the alumnus is able to choose at what level they would like to support the organization. This is becoming the preferred method of financial support for an alumni association. These funds are distributed between administrative, event planning and chapter support functions (such as fundraising objectives, or scholarships through the PIKE Foundation). Named levels should be updated to reflect your organization.

- First five years out of college – \$50
- More than five years out of college – \$200
- President's Society – \$250 - \$400
- 1913 Club – \$417
- Knox Pledge – \$500 - \$999
- Dagger and Key – \$1,000 - \$2,499
- 417 Prospect Benefactor – \$2,500 - \$4,999
- Beta Alpha Honor – \$5,000 or more
- Other – \$_____

Recurring Monthly Dues ("The Drip" effect)

1868 Club – automatic payments of \$18.68/per month via ACH transfer or other payment processing site (e.g. PayPal).

Donation Menu

If soliciting baseline administrative funds, a menu can be provided for other giving opportunities. If using the Campaign Dues Structure, it can be noted how every dollar collected will support different activities, like those described below.

- Recruitment – \$20
- Continuing Education – \$20
- Scholarship – \$25
- PIKE University – \$25
- Housing Improvements – \$30
- Other – \$_____
- TOTAL: \$_____

Alumni Association Sample Newsletters

One of the key areas of focus for an alumni association is communication. We know that in order for an alumnus to feel engaged with Pi Kappa Alpha they need to receive meaningful communication. By partnering with the active chapter, an alumni association produced newsletter allows your group to engage/re-engage your alumni with the chapter, your association, and Pi Kappa Alpha. Here are some sample topics that you may include in your newsletter, but not limited to:

- Chapter updates
- New member listing
- Intramural wins
- Alumni event information
- Alumni event recap
- Alumnus updates
- Association fundraising goals
- Donor recognition
- Link to update contact information
<https://www.pikes.org/resources/alumni-association-resources/update-my-info>
- Housing updates

Over the next few pages you may find sample alumni newsletters from some of our alumni associations. Pi Kappa Alpha recommends using a free communications tool, such as www.mailchimp.com, to effectively send electronic newsletters and other immediate communications. For a MailChimp tutorial on how to use the service, create PIKE branded resources, and all other marketing resources visit www.pikes.org and look under the Resources tab or click [here](#).



My Zeta Sigma Brothers,

Zeta Sigma Alumnus, Dave Force, is coming to speak to the active Brothers on Saturday, September 26th at 4 PM. While Brother Force is in town, Fla Tech managed to get Dave speak on campus.

Brother Force's talk with the active Brothers is open to all alumni and other Greek Fraternities on campus as well. His Saturday presentation will take place at 3:00 PM - 6:45 PM on campus at 110 Auditorium, Skurla Hall.

On a personal note, Dave goes back to the early Zeta Sigma era of the early 70's. I am blessed to be able to call him a Brother and a Friend.

Do yourself a favor and take a Saturday afternoon off to attend Dave's presentation. It is interactive and probably will take directions you never imagined.



Renowned Behaviorist Dave Force

to Hold Public Lecture Sept. 25

Florida Tech Alumnus to Talk About Handling Life's Hurdles

MELBOURNE, FLA. Dave Force, a Florida Institute of Technology alumnus who spent three decades at SeaWorld developing standardized training techniques for behavior, will be on campus Friday, Sept. 25, and deliver a free lecture from 3-4 p.m. in Room 130 of the Olin Life Sciences Building.

Now a principal at San Antonio, Texas-based Constructive Behavioral Consulting, whose clients have included Fed Ex, Buffalo Wild Wings and Toyota, Force was a member of the Florida Tech

We need YOU!

This is year 23 Alumni have been responsible for raising nearly \$5,800 enabling 40 PIKES to attend the Fraternity's world preeminent Leadership Training series - PIKE University. Alpha Rho has initiated over 1,000 men into our bonds. It is time to step up.

Our financials below show that we spend every dollar received on quality programming, and invest in the future of Alpha Rho.

Join us today. Giving is easy...send Tony Mayne, at tony.mayne@gmail.com, a note with your pledge. You will receive an e-mail with an Square-based invoice that allows you to complete your pledge via debit or credit card.

Budget	Estimate	Actual
Philadelphia LS x 25 @ \$115		
CEC @ \$300 x 3		
Chicago LS - 20 @ \$135		
Founders Day		
Int'l Convention x 2 @ \$400		
Int'l Convention x 1 @ \$1000		
AP Endowment Fund		
Int'l Dues 2015-2016		
Total		

Use this area to offer a short preview of your email's content.

View this email in your browser



PI KAPPA ALPHA.
Scholars, Leaders, Athletes, Gentlemen

Drop Content Blocks Here

You can create unique layouts by placing a variety of content blocks in different sections of your template.

Use the "design" tab to set styles like background colors and borders. These have already been set for you. If you want to make different backgrounds, use the color codes below.

Brand Color Codes:

Garnet: Use [hex code #76232f](#). This is also the headline color.

Gold: Use [hex code #d99634](#).

The garnet lines are called "dividers." To use them between additional areas of content, click on the line, copy and drag the copy to where you want it.

If you need a bit of inspiration, you can [see what other MailChimp users are doing](#), or [learn about email design](#) and blaze your own trail.



Example photo (600 to 800 pixels wide is optimum). Use this area for a caption.

Heading 3 from "styles" dropdown" is Verdana.

Use "Heading 3" to get a reasonable size headline for viewing on a mobile device.

This is a text block. You can use it to add text to your template. You can use the text box if you want a text box without a color.

Phone:

People like to see images of successful men. Try to include at least 2 or 3 good photos in every newsletter. Remember to use the rich text editor to resize photos to 800 pixels wide for optimum display on mobile devices.

Mobile First:

Over 50% of the emails sent by the Fraternity are viewed on mobile devices. Use this template to ensure you'll have a good product for mobile. You can use the "Preview and Test" function of MailChimp (upper right hand corner of the screen) to see what your email will look like on smartphones.

If you have any questions, email us at pike@pike.org

THE PI KAPPA ALPHA FRATERNITY

PIKE

Scholars, Leaders, Athletes, Gentlemen

Alumni Event

March

1

Join us for a Founder's Day Event
Sunday, March 1st
at the chapter house
Please RSVP by February 14th via this
[email link](#).





PIKE PRESS

Gamma Chi Chapter of Pi Kappa Alpha
at Oklahoma State University



FALL 2014

You Get What You Give Why Dick J. Beshear '73 Keeps in Touch

Dick J. Beshear '73 strongly believes that if you don't put effort into things, you don't get much in return. "It's the same with the fraternity and anything else in life. I have put a lot of time and energy into Gamma Chi Chapter, but I have been blessed beyond measure by the men and their families I have gotten to know in the process."



Since Dick graduated he has been volunteering with Gamma Chi. He has served as a chapter advisor and as both president and treasurer of the house corporation. He values the experience he received as an undergraduate and wants to not only see other men afforded those same opportunities, but continue to develop his membership as well.

"I was from a small town in rural Oklahoma, and **Dr. B. Paul Choate III '72** invited me to meet some of the Gamma Chi brothers. While I was an undergraduate I met people from all over the state and country. It broadened my outlook and allowed me to see other possibilities in life. I was able to take the traits of people I admired and make them my own."

Dick's favorite undergraduate memories come from pledgship. "It was a tough time, but it formed a bond between my pledge brothers that remains to this day. I haven't seen many of them for years, but I still know what good men they are and that when we meet again it will be like we were never apart."

As an alumnus, Dick is still inspired by his fraternity brothers every day. One brother in particular is the late **J. Lewie Sanderson '39**, whom the current chapter house is named after. "Working with Lewie was one of the greatest pleasures of my life. I remember Lewie's timeless

(Continued on page 6)

HOUSE CORPORATION PLANS FOR GAMMA CHI'S FUTURE

Campus Housing More Competitive Than Ever

As students continue to evolve with the technology and material-based 21st century, it's easy to see who can keep up with today's demands and who is being left in the dust. In recent years, Stillwater has seen an upswing in the amenities offered by student housing, both on campus and off. These new buildings are a far cry from the bare-bones brick walls and metal bunk beds many of us were accustomed to.

Before the Internet, smart phones, satellite TV, and video games, students would spend very little time in their rooms, as there wasn't much to do. Socializing took place outside of the dorm and they were forced to interact in public. But times have changed. Socializing can take place anywhere, and students want to be comfortable doing so.

If you were to do a Google search of "Stillwater student housing," the most popular results feature indoor recreation facilities, pools, individual bathrooms, wireless Internet, and much more. These luxury housing amenities coupled with the many new and renovated fraternity and sorority houses on campus make it easy to see why competition for the student dollar is at an all-time high.

Within the last 15 years, the campus climate has changed in regard to freshman housing. It was once mandatory for freshmen to live on campus, but now more students are looking at their off-campus options, and they recognize the benefits of both. Students now also weigh their privacy against the ease of getting to campus. Despite the extra driving time, apartments are viewed as the more enticing option, because of the extra privacy and nicer amenities. Off-campus housing also allows for less-stringent rules than living in a dorm and offers students more social freedom.

As I see these changes made around campus and in Stillwater, I find myself stepping back to evaluate how Gamma Chi will continue to compete and thrive at OSU. In the meantime, our undergraduates strive toward excellence regardless of where they live, ensuring the student population knows the men of Pike are all scholars, leaders, athletes, and gentlemen.

As we begin to plan for Gamma Chi's future, alumni support is more important than ever. I encourage you to reconnect with the chapter and your pledge brothers today and do what you can to help Pike stay strong.

Fraternally,
Larry Ricker '65
House Corporation President
(405) 372-7617
larry.ricker@gmail.com

Interested in
volunteering?
Contact Larry
Ricker '65 at
larry.ricker@
gmail.com.

CANDLELIGHT

Beta Phi Chapter of Pi Kappa Alpha • Purdue University
Published by the Beta Phi Foundation



— SPRING 2012 —

INSIDE:

ED NEUFER '59
REFLECTS ON IKA
2

THANK YOU,
LOYAL BROTHERS
3

BETA PHI
BOASTS TOP-THREE
PLEDGE CLASS
4

ALUMNI UPDATE
5-6

\$6,850 RAISED TOWARD \$25,000 MATCHING CHALLENGE

Alumni Encouraged to Make a Commitment Now

Over the last year, many Beta Phi alumni have generously donated their time, expertise, and money to renovate our Chapter House at 629 University. I am confident that Pi Kappa Alpha will soon have a facility that complements our mission to positively affect and change the lives of young men at Purdue University.

We have raised nearly \$894,070 to date, but we must raise an additional \$306,000 to reach our campaign goal of \$1.2 million. While that's a lot of money, it is encouraging to have raised this impressive sum from just 180 alumni (10% of our total alumni base). I know that we will reach our goals; we just need the right motivation.

To help us with that motivation, a generous 1960s-era alumnus has issued a \$25,000 matching gift challenge to spark new and increased giving. He has agreed to match \$0.50 for every new dollar donated to the campaign—up to \$25,000—between now and the annual golf outing on Saturday, June 23. So far, we have raised \$6,850 toward the challenge and we only have 60 days to go! In order to secure the full \$25,000 match, \$50,000 of new donations must be

pledged before the June cutoff date. Now is the time for us to secure this once-in-a-lifetime opportunity.

Before you come to Purdue for the annual golf outing, please make a commitment to the *Honoring Our Legacy, Securing Our Future* campaign. You will feel very proud about your philanthropic commitment when you reminisce with fellow alumni and interact with our impressive undergraduate members.

Please pull together with your classmates to make this phase of our campaign and the golf outing a huge success. Remember, the brothers who preceded us built a house enabling the wonderful, life-changing experiences that we all cherish. Let us not let down the current and future generations.



In the bonds of φκκα,
Brian Doolittle '70
Campaign Committee Chairman
brdoo@comcast.net

Dedicated Donor Bruce Bailey '72 Supports Pi Kappa Alpha

Like John Belushi's character in *Animal House*, I loved college and Pi Kappa Alpha so much I went to Purdue for seven years as an undergraduate. I chose to join Pi Kappa Alpha after the usual recruitment parties and for a series of common reasons: I liked the house, had friends from the freshman dormitory pledging too, and liked the active brothers I met. In hindsight, I would recommend putting first and foremost how you feel about the people pledging with you and that had just joined in the last year or two, as those would be the people you are most likely to live with over the next three or four years.

Unaware at the time what I was doing, pledging the fraternity brought rewards I never considered. At ages 17 or 18 or
(Continued on page 2)

CAMPAIGN LEADERSHIP

CHAIRMAN	Mike Wright '85
Brian Doolittle '70	Mike Kristakis '86
	Bill Kinder '95
MEMBERS	Alex Britton '07
Dabo Dabasinskas '59	Aaron Smith '09
Charlie Kent '60	EMERITUS
Dick Duncan '69	Rich Russell '58
Ralph Born '72	Charlie Hetrick '63
Bob Deprez '81	Jim Barr '66
Joe Conti '85	

HONORING OUR LEGACY, SECURING OUR FUTURE
The Campaign for Beta Phi

2012 SPRING EDITION

the BROTHERLY LINK

GAMMA DELTA • THE UNIVERSITY OF ARIZONA

Bulletin

OFFICIAL ALUMNI NEWSLETTER – Reconnecting Involvement for Differentiated Excellence - April 2012



AZPikes.com Alumni site
ArizonaPikes.com Chapter

Newsletter will go paperless, if you would still like a hardcopy email:
 Alumni Relations Chairman
 Michael Hess at:
Alumni@ArizonaPikes.com
 To update information or add another Alumni's info:
www.tinyurl.com/AlumniContacts

LinkedIn.com: UofA GD Alumni
<http://www.linkedin.com/in/uapikes>

Key Calendar Dates:

Mar. 30-Apr.1 Vegas Formal
 Apr. 9-14 Spring Fling w/ KKG
 Apr. 14-15 Comm. Service Trip
 Apr. 16 Housing Work Day
 Apr. 7 Dad's/Alumni Weekend
 Apr. 22 Alumni Event TBD
 Jul.26-30 Int'l Convention, Denver



ϕϕ GAMMA DELTA κκ

A Chapter of Excellence.

Our chapter continues to grow and maintain dominance on campus. We are continuing the momentum from the Fall semester as we keep our sights on winning back to back Smythe awards. After successfully welcoming 34 Zeta class members into our brotherhood last fall, we are looking forward to the Spring Eta class who will be beginning their new member training these next few weeks.

Alumni Weekend Apr. 6-7

Join the active brothers as we celebrate our alumni, embrace our brotherhood, and enjoy a great day! Partnered with our annual Dad's Day Weekend, this year's event is expected to have our best turnout.

Friday night 4/6: 6pm Tucson Padres AAA Baseball game & private hospitality

Saturday 4/7 Activities: 10am Golf foursomes, at Randolph near campus, afternoon Poker tournament & barbecue at Chapter House

Preferred rates at Doubletree Hotel on Broadway. Visit www.AZPikes.com to RSVP.

Drachman Kitchen in Full Swing Again

Three years after rechartering in the Drachman House, our kitchen is now operational and feeding hungry brothers. Due to the hard work of our house manager, Nick Crutchfield, we were able to coordinate with Upper Crest food services to receive meals Monday through Friday. Our menu includes made to order eggs in the mornings, a full salad bar, and a rotating menu that never repeats itself within a six week period. Eating as a family everyday has brought our brotherhood closer than ever.

2012 Dream Girl

The 3rd annual PDGC will be under way soon as the 2011 PIKE Dream Girl, Kelly Vanneman,



Pike Takes Over Catwalk

Catwalk is a 5K fundraiser for the Bobbi Olson Fund at the Arizona Cancer Center. Each year around 3,000 participants help to raise over \$50k. Next fall, the brothers of Pike will be taking charge of operations. This adds another huge round to our philanthropic arsenal.



Pi Kappa Alpha

Iota Iota Chapter – Michigan State University

Winter Edition 2011 – www.msupikes.org

301 Charles Street
East Lansing, MI 48823



In this issue:

1. Letter from President
2. Housing Improvements
3. Alumni Golf Outing & Banquet
4. Alumni Updates

Letter from the President

Welcome to the Iota Iota Chapter of Pi Kappa Alpha. Please take the time to browse through our newsletter to learn more about who we are as men of Pi Kappa Alpha. As a house, we strive to carry on the strong tradition of the Iota Iota chapter at Michigan State University, and are constantly working to grow towards the next level. Our focus is developing leaders and positive character traits that will continue for a lifetime, all while enjoying the undergraduate life and the experiences that come with it. As a house, we have developed issued newsletters to inform families, alumni, and members on housing improvements and future events. I certainly hope this newsletter serves a purpose for you. If you have any questions or comments regarding Pi Kappa Alpha, please do not hesitate to contact me.

In Deepest Sincerity,

Stefan Figurski

President, Iota Iota Chapter

Scholars

As of the spring semester of 2011, the Iota Iota chapter has achieved an average cumulative grade point average greater than 3.4, giving us the second-highest GPA among all fraternities at Michigan State. The chapter stresses the importance of academic success throughout the recruitment process to prospective members of the chapter. Active members have also gotten in to the habit of walking together to the Union or the Main Library to study together or even tutor one another.

Our chapter does not overlook the scholastic portion of the college experience, and feels that one of the major portions of its success has been due to educating new and active members on the benefits of a balanced life – both socially and academically.

Planning Events

Along with newsletters, emails and your website, association-sponsored events are major functions of an alumni association. At these events, the social ties of the Fraternity's alumni are allowed to continue and prosper. There are a number of events which are coordinated by an alumni association, many times in conjunction with the chapter's assistance – these include, but are not limited to: association meetings, monthly luncheons, International Work Day, Homecoming, Founders Day, golf outings, and banquets.

Alumni Association Meetings

Each business meeting should limit itself to just the meeting and should not conflict with a social activity. An agenda should be composed and distributed at the meetings, and in most cases, the agenda should include the association's financial report, report of special projects or committees, a listing of upcoming events, communications and elections. If possible, a report on the status of the undergraduate chapter should also be given. Attendance is always boosted by notifying the participants of the date, time and location of the next meeting before adjourning.

Monthly Luncheons

Many Alumni Associations sponsor monthly or quarterly luncheons in the city where their chapter is located or in a metropolitan area where most alumni reside. The agenda at these luncheons should be fairly casual with most of the time dedicated to interaction and networking between the alumni present.

However, a leader in the community or area business, or a university official or athletic personality being invited to make remarks could be an excellent way to increase attendance. At some point, the association president should make announcements regarding upcoming events.

If conducive, have the luncheon at the chapter house. The association can contribute extra funds to provide for the additional meals. In addition to getting alumni over to the chapter house, this also provides the opportunity to interact with undergraduate members. However, the location should be central to the majority of the alumni membership. Chapter representatives should be invited to each luncheon.

International Work Day

Chapters, colonies and house corporations across North America plan a day, primarily in the months of April and May, to get together with students, alumni, parents and guests to improve the chapter house and/or grounds. Groups conduct projects and provide food and fellowship for all who participate. Since its inception, International Work Day has become an annual tradition for many PIKE chapters, their alumni, and house corporations.

Every participating chapter qualifies for many incentives, which include a \$250 participation grant, an event planning kit, recognition in the autumn *Shield & Diamond*, and eligibility for selection in one of six International Work Day Award categories. In addition to the participation grant, all award recipients receive a \$100 gift certificate at a hardware store in their area and the Overall Work Day Award Winner receives a \$500 participation grant and a trophy to be proudly displayed in their house.

In late February, watch for an invitation via e-mail, check the housing section on the Fraternity's website for dates and details, or look in the spring issue of the *Shield & Diamond* to see if your chapter or the chapter nearest you is participating. If you have difficulty contacting the project coordinator, or the information on the website, www.pikes.org, doesn't answer your questions, call (901) 748-1868 and ask to speak with someone in the Real Estate Department, or email the Real Estate Department at pikehouse@pikes.org and ask for information about getting involved.

Other Association Activities

There are a wide variety of Alumni Association events which fit into the “other” category. These events can be split into two categories: smaller types of events and major events. Examples of smaller events include:

Golf Outing

Barbecue

Outing to a sporting event (school or pro league)

Holiday Reception

Alumni-active sporting event

Canoe trip or other outing

Chapter Scholarship Dinner

International Work Day

Sponsored Chapter Recruitment event

Tailgates or pre/post game receptions

Civic activities (blood drive, food drive, etc.)

Examples of major alumni association events, and ones which will require more planning, include:

Homecoming Weekend

Founders day or other banquet

Special anniversary

Holiday dinner-dance

Obviously, even the smaller events can turn into large, complicated gatherings. However, the keys to successful alumni events include advance planning and advance notification to alumni.

Event Planning Tips

Consider the following points as you plan your event:

Keep your event cost reasonable. Cost is a major factor for individuals when deciding whether or not to attend your event. A relatively high price will prevent alumni, especially recent graduates, from attending. A price of \$35-\$50 per person is about the national average for banquets.

Distribute event evaluations. Ever wonder if those who attended your event had a good time? Were there areas that could have been improved? The best way to answer these questions is to develop a short, simple evaluation to have your guests complete at or a few days following the event. Evaluations will provide you with invaluable information for planning the next event.

Find a venue that is centrally located. Another factor that determines turnout is where you hold your event. Consider having activities at a site easily accessible to alumni in your area. Sites that have a novel twist can also enhance turnout. Stadium clubs, museums and other attractions might be alternatives to hotels and country clubs.

Budget your event cost to cover the basics. As you set your event price don't forget to factor in the following: meal cost, tax, gratuity, room charge, guest speaker's meal, audio/visual charges if used, decorations and door prizes.

Keep your program brief. An hour-long program featuring your guest speaker or other activities, plus an hour for dinner, is generally long enough. Your attendees will become restless with a long, drawn out program. The goals for your event should be to generate enthusiasm and provide information about the Fraternity and the Alumni Association, and the chapter if applicable.

Silent auctions generally work better than live auctions. If your association plans to have an auction, consider having a silent auction. Silent auctions not only give people something to do during the social hour (browse through the items), they also take less time to administer than live auctions. This is a great way to raise revenue for scholarships or to provide funding for a future association event.

Adding the Extras

Depending on the type of Alumni Association activity, the following “extra” suggestions and ideas can be used to get the most of an event:

1. **Budget** – Avoid overestimating the number of attendees by cutting off registration far enough in advance so the attendance can be confirmed with the facility. Plan on last minute cancellations as well as late registrations.
2. **Undergraduates** – Be sure all chapter members are aware of the event and expectations of attendance and participation are clearly presented.
3. **Contact Local Hotels** – Get special rates, and list it in all publications.
4. **Wives and Older Alumni** – If wives and children are welcome, make sure they know it. Plan non-athletic activities for older alumni and families such as an open chapter house, campus tour, school art gallery tour, shopping trip, etc..
5. **Child Care** – Arrange to have the undergraduates or a sorority assist in keeping any children entertained.
6. **School Alumni Office** – Inquire to what services are available, such as mailing labels, use of phones and school facilities. Invite a representative from the university to speak or attend any major banquets.
7. **Photographer** – Plan to have a group picture of all alumni attending to include in future publications.
8. **Banquet Etiquette** – Make use of a head table, speakers and a program.
9. **Alumni Awards** – give out recognition for fraternity service, community leadership, oldest member present and possibly other awards.
10. **Chapter Scholarships** – Provide scholarships to the local chapter in recognition of leadership, academic excellence, etc. This will get the chapter more involved and provide insight into an association they will be expected to join upon graduation. For more information or assistance in this matter, contact the Pi Kappa Alpha Foundation at (901) 748-1948.
11. **Guest Book and Name Tags** – This allows for better recognition of participants, address updates, and listing of attendees in the next newsletter to increase interest in future events. Arrange to have a welcome committee to supervise registration, signing the guest book, pinning on name tags, handing out programs and football tickets, etc..
12. **Feature Article for the Next Newsletter** – Include the names and initiation years of the attendees to help increase visibility for future events.
13. **Thanks** – Publicly and privately thank all alumni who have helped. Send a handwritten thank you to special alumni.
14. **Evaluations** – Evaluate and document everything from the promotion of the event to the facilities used. This information will become invaluable in future years.

IRS Tax Exempt Status FAQ

What is our tax-designation?

Unless altered by the alumni association, all Pi Kappa Alpha Alumni Associations are considered 501(c)(7) organizations. This is an Internal Revenue Service (IRS) designation stating that the Alumni Association is exempt from federal income tax under the Internal Revenue Code (IRC) 501(a) as organizations described in IRC 501(c)(7) as being “organized for pleasure, recreation and other non-profitable purposes.”

A common misconception is that a chapter is considered to be a 501(c)(3) organization as opposed to a 501(c)(7).

The difference is that a 501(c)(3) organization must spend their income on activities that further their exempt purpose, which is a charitable cause. 501(c)(7) social clubs’ exempt purpose does not have to be charitable, but it must be social or recreational and non-profitable. Designation as a 501(c)(7) also allows the group to limit membership. Instead of operation like a business for the public, 501(c)(7) organizations only serve its members.

What does this mean?

All alumni associations are required to file annual tax returns that are due **3 ½ months** after the end each fiscal year. For example, if your fiscal year is from July 1st- June 30th, which is a suggested practice, your tax returns will be due **November 15th**.

Alumni Associations do not have the ability to provide a tax deductible receipt for any kind of donations when funds are directed through the chapter. As a 501(c)(3) designated organization, the Pi Kappa Alpha Foundation has the legal capacity to provide tax benefits to those who donate money for the designated charitable purpose of the organization. Chapters may also elect to have alumni direct donations to the Foundation toward programs that benefit the chapter.

For tax purposes, alumni associations are considered to be subordinate groups of the International Fraternity and should use the Fraternity’s group exemption number to apply for their individual employer identification number (EIN).

What forms is my alumni association responsible for filing?

The following table outlines what annual forms your alumni association is responsible for filling out based upon the annual gross receipts in the given fiscal period.

Fiscal Year Totals	Form to File	Where to File
Gross receipts less than or equal to \$50,000	990-N (E-Postcard)	Irs.gov; file990.org; OmegaFi
Gross receipts less than \$200,000 and total assets less than \$500,000	990-EZ or 990	File990.org; OmegaFi
Gross receipts greater than or equal to \$200,000 or total assets less than or equal to \$500,000	990	OmegaFi; local accountant/CPA

Gross Receipts: The total amount the organization received from all sources of income during its annual period, without subtracting any costs or expenses.

Is my Alumni Association at risk of having its exempt status revoked?

Any organization that has not filed one of the three 990 forms above for three (3) or more years will automatically have their tax exempt status revoked by the IRS.

What happens if our tax exempt status is revoked?

If an organization loses its exemption, it will have to reapply with the IRS to regain its tax-exempt status. *Any income received between the revocation date and renewed exemption date may be taxable and subject to potential fines.* For more information, see the Exempt Organizations page on the IRS website.

Please contact the finance department for further instructions, finance@pikes.org.

Passed at the 2014 International Convention:

“Each chapter and alumni association shall be in full compliance with Internal Revenue Service annual filing requirements. Should a chapter or alumni association not comply with this provision, the executive vice president shall have the authority to cause such filing(s) to be made and to bill the cost of filing to the chapter or alumni association.” (Code IV § 14)

This means that failure to comply with IRS policies regarding the Associations tax exempt status will result in the International Fraternity fronting costs associated with reaching compliance and billing these costs back to the alumni association. This provision was voted on and approved on the International Convention floor due to the growing concern of chapter and alumni associations not maintaining their tax-exempt status.

For all questions and concerns related to the tax exempt status of your alumni association, and/or the annual tax filings, please contact the finance department, finance@pikes.org.

AA ACH Authorization Form

ELECTRONIC WITHDRAWAL AUTHORIZATION FOR ANNUAL ALUMNI ASSOCIATION DUES

I (we) hereby authorize the below indicated electronic withdrawal from the account identified on the attached voided check. Please process the annual alumni association dues for the association listed below. I (we) understand that I will be notified in advance of any withdrawal, and that withdrawals will occur annually until I (we) direct otherwise. Annual dues are currently \$125; any change to this amount will be communicated to me (us).

Alumni Association name: _____

Name/Association on account (please print):

Signature: _____

Date: _____

Email Address: _____

*Send to the Pi Kappa Alpha Memorial Headquarters
8347 West Range Cove
Memphis, TN 38125
(PLEASE ATTACH VOIDED CHECK)*