



PIKE Volunteer

Alumni Association Chartering Checklist

The following outlines the different processes involved in chartering an alumni association. Proper documentation and copies of documents should be sent to the Memorial Headquarters to be archived. Please contact the Alumni & Volunteer Department with any questions. All documents referenced are available under the alumni association section of www.pikes.org.

- Solidify association leadership team.
 - Below is a listing of the *Ideal* Board of Directors (w/ chartering focus areas)
 - **President:** (Recruitment of leadership team)
 - **Vice President:** (Chartering process)
 - **Secretary/Treasurer:** (Financial processes)
 - **Director of Membership:** (Membership recruitment)
 - **Director of Communication:** (Communication of chartering events)
 - **Director of Events:** (Chartering events)
 - **Director of Fundraising & Philanthropy:** (Fundraising campaign)

- Establish association name.
 - It is recommended that chapter based associations assume chapter designation (i.e. Omega Omega Alumni Association).
 - Area associations should assume city/metro name (Chicago Area Alumni Association).

- Recruit 12 or more Founding Fathers.
 - These men will likely encompass leadership team and others willing to be involved. All names will be listed on charter. Being listed as a Founding Father is a great way to entice involvement in the association.

- Develop association's communication structure via *Association Launch Guide* document.

- Open association bank account.
 - Account should be opened in the name of the association. President and Treasurer should have access to account.

- Create membership funding structure (either dues structure or annual campaign).
 - Dues structure: Keep dues low (under \$50). Dues offset administrative & communication expenses. Dues paying members may get small discounts for association activities.
 - Annual campaign: One-time ask for gifts to fund association activities. May include support of other association sponsored activities.

- Establish association bylaws.
 - *Model Bylaws* document available. Bylaws should be sent to Memorial Headquarters to be archived.

- Apply for Employer Identification Number via *EIN Application Process* document.



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- Complete *Petition to Charter* document.
 - This document will help with charter creation, reporting of association leadership and necessary documentation.

- Pay chartering fee of \$200.
 - Chartering fee covers first year of association dues (\$150) and charter creation.

- Set chartering date and event.
 - This is a great opportunity to have a first event. Charter can be presented to association and founding fathers. If a chapter based association; be sure to involve the chapter, advisory board and house corporation in this process.