

APX Alumni Association Baseline Taskforce Presentation

- **Agreement on the Baseline Task Force assignment**
- Final input and agreement on the AA and Chapter survey (see attached)
- A very preliminary discussion of what we would like to see as deliverables from the Task force.
- What work can be done at the summit.

APX Alumni Association Baseline Taskforce Assignment

Initial Assignment Issues

- Expectations of AAs
- Expectations of AAs from students
- How to hold AAs accountable
- Annual reporting
- Required communications
- AA resource packet



Assignment Issues after Discussion

- Expectations for a healthy AA from themselves, students, and National
 - Survey of other Fraternities to see their goals/expectations/activities
- Annual baseline AA report including legal, informational items, and metrics to track important items related to improving the AAs.
 - An initial survey to help develop above issues.
- Other Task Force deliverables including a review of current AA resource documents to add needed info.

APX Alumni Association Baseline Taskforce Presentation

- Agreement on the Baseline Task Force assignment
- Final input and agreement on the AA and Chapter survey (see attached)
 - As short a survey as possible
 - Focused on Broader information, more detailed metrics to be included in the proposed annual report.
 - To be incorporated into full Survey
 - An Outline of the external survey
- A preliminary discussion of what we would like to see as deliverables from the Task force.
- What work can be done at the summit.

APX Alumni Association Baseline Taskforce Survey

Brother Alumni Association Presidents,

As part of an ongoing process to improve our Alumni Associations (AAs), a Task Force was formed to research the current situation within our AAs and to recommend an ongoing process for the AAs to provide Baseline information to the Fraternity. This information will be used to guide projects for improvement of the fraternity and, in particular, the AAs.

The survey you find below is intended to give us a snapshot of ongoing activity in your AA. From this survey we hope to learn what is most critical to AA success and to distill what an annual AA report could look like.

Please fill out the survey below And return to _____ by _____. If some information is not readily available to you or your organization, we ask that you use your best estimate as a response.

Fidelitas, Amor et Artes,

The Baseline Taskforce

APX Alumni Association Baseline Taskforce Survey

Q1a. Alumni Association name _____

Q1b. Name of person completing form _____

Q2a. Approximately how many “active” members do you have? _____

Q2b. What do you use as a definition for “active” in your response above?

Q3. About how many members are you in in contact with on a yearly basis if you include contact via FB, mailings, attendance at events, etc. _____

Q4a. How much do you ask for yearly dues? _____

Q4b. About how many members have paid dues on average over the last few years. _____

APX Alumni Association Baseline Taskforce Survey

Q5a. How many members do you have on your board? _____

Q5b Beside the required Board Members (President, VP, Sec, Treasurer) What other standing heads of committees do you have (i.e. Communications Director, Social Chairman, etc.)_____

Q5c. How many times does your Board meet in a typical year? _____

Q6. What does the Association use as a digital home base? Please mark all that apply.

- 1. Web site** _____
- 2. Facebook** _____
- 3. MemberPlanet** _____
- 4. Other (please describe)** _____

APX Alumni Association Baseline Taskforce Survey

Q7. Other than the items in Q6, how does your Association communicate with its members. Please mark all that apply.

- 1. E-mail _____
- 2. Land mail _____
- 3. Telephone _____
- 4. Newsletter _____
- 5. Group Chat _____
- 6. Other _____

Q8. What kind of events does your association participate in during a typical year, either on their own or in conjunction with the actives (Founders Day, picnics, dinners, retreats, initiations, etc. Please describe.

Q9. Is there any other information you think the Grand council should know about your Alumni Association and/or how it can be more successful?

APX Alumni Association Baseline Taskforce Survey

Brother Worthy Architects,

As part of an ongoing process to improve our Alumni Associations (AAs) and provide positive, constructive communications between AAs and their associated Chapters, a Task Force was formed to research the current situation among our AAs and chapters and to help in recommending changes to improve that relationship for all AAs and Chapters.

Please fill out the short survey below. We appreciate your help in this process.

Fidelitas, Amor et Artes,

The Baseline Taskforce

APX Alumni Association Baseline Taskforce Survey

APX Chapter Baseline Survey

Q1a. Chapter name _____

Q1b. Name of person completing form _____

Q2. “If your chapter does have an associated Alumni Association, please describe how you interact with them. Do you have regular combined events, are you invited to each others events and meetings, do they offer scholarships, office tours, etc.

APX Alumni Association Baseline Taskforce Survey

Q3. Do individual alumni stay connected and participate in chapter life or is participation only through the Alumni Association?

Q4. Does the Alumni Association fund anything for the Chapter?

Q5. Are there any other things you wish the alumni or Alumni Associations would do for or with the Chapter?

External Fraternity/Sorority Survey

Main Objectives/Discoverables

- Define type of Fraternity/Sorority (Social, professional, other)
 - Approximate size, membership, # chapters
- What are the goals and purposes of the Fraternity/Sorority and how do they define them
- How does the National communicate directly with/activate membership
- What does the National regularly measure (if anything) relative to Chapter status/activities
- What is the chapters relationship to their National
 - Dues paid
 - Reporting
 - Support from the National
 - Other
- What activities do the local chapters regularly carry out

External Fraternity/Sorority Survey

Methodology

- Each group member to select 2-3 targets
- Contact principal spokesperson for each group and interview them
- Report results back to Taskforce

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APX Alumni Association Baseline Taskforce Deliverables

Possible Deliverables

- Initial survey results (both internal and external) and analysis of impact on other deliverables.
- Format for an ongoing, yearly AA report of AA status and health, including legal, informational items, and metrics to track important items related to improving the AAs.
- Review and suggested revisions of existing AA reference documents and possible new documents, focused on
 - What is expected by all relevant parties from a healthy, active AA
 - Suggestions as to what kinds of activities can help AAs achieve a higher level of activity and health.
- A possible award/recognition program to help motivate AAs to improve and increase activities.

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APX AA Baseline Taskforce Work at Summit – Discussion

Expectations of a healthy, active Alumni Association

- From Handbook
 - Provide advice, assistance and support to the associated Active Chapter
 - In a spirit of mutual cooperation
 - Help perpetuate relationships between members after leaving the Fraternity
- Additional
 - Promote active participation by brothers in Fraternity activities
 - National
 - Local Chapters
 - Metro Groups
 - Local Active Chapters
 - Participate in local chapter and National financial support

APX AA Baseline Taskforce Work at Summit - Discussion

Activities to help create a healthy, active Alumni Association

More Help Needed in How to Do This
Should be incorporated into Official Documents as “Best Practices”

Activities relating to Active Chapters (Examples)

- Serve as bridge between University and professional world
 - Office visits
 - Review resumes
 - Summer internships
 - Speakers for Chapter events
- Promote activities between Active Chapters and Alumni Associations
 - Memberships on each others Boards
 - Founders Day events
 - Jointly planned and executed events (Speakers, Chapter milestones, etc)
 - Others??
- Scholarships, etc.

APX AA Baseline Taskforce Work at Summit - Discussion

Activities to help create a healthy, active Alumni Association

**More Help Needed in How to Do This
Should be incorporated into Official Documents as “Best Practices”**

Activities relating to Alumni Associations (Examples)

- Communications
 - Newsletters, Facebook, Web sites, etc.
 - Cards, visits to older Brothers. Report on stories
 - Condolence letters for deceased Brothers
 - Etc.
- Promote Brother to Brother contacts/relationships
 - Participation at chapter and national level task forces and offices
 - Attendance at National Convention
 - Supply cross level AA information (Spotlight and “Best Practice” reports
 - Others??

APX Alumni Association Baseline Taskforce Timeline

Pre Summit

- Discussions of Task Force assignment
- Discussion of AA expectations from all parties
- Design of initial survey, initial discussions of Annual survey
- Discussions of ways to improve AA activity levels
- Discussion of deliverables

At Summit

- Get feedback from other Alums on survey
- Input from other Alums on AA expectations and ways to increase activities
- Review current AA reference documents (work session)
- Discuss timeline (work session)

After Summit (xxx months)

- Execute/analyze survey
- Design Annual metrics report
- Review/rewrite existing AA reference documents
- Design Award/recognition program
- Final report