



Alumnae Group Merger Checklist

STEPS FOR THE REGIONAL ALUMNAE SPECIALIST (RAS)/ ALUMNAE DEVELOPMENT CONSULTANT (ADC)

Merger Communication: When deemed appropriate, a RAS/ADC may communicate with two alumnae groups about the potential benefits of merging. After gauging the groups' interest, the RAS/ADC should communicate the potential merger with the Regional Director to ensure her support.

Notifying Volunteers and Staff: If it is likely that the groups will move forward with a merger, the RAS/ADC should notify:

- Council Trustee: Alumnae (councilalumnae@deltagamma.org)
- Director: Alumnae Development (alumdevelopment@deltagamma.org)
- Director: Alumnae Operations (alumoperations@deltagamma.org)
- Alumnae team at Executive Offices (alumnaedept@deltagamma.org)

The alumnae team will verify that both groups are in good financial standing with the Fraternity. The merging group is asked to have paid all past financial obligations before merging with another group.

Vote to Merge: If the decision is made to move forward with a merger, a vote should be taken within both local alumnae groups. If the vote does not pass in either of the groups, please inform volunteers and staff (from the previous step) of the outcome. If the vote to merge does pass in both groups, please move on to the next step.

Gathering Documentation: If both alumnae groups vote to merge, the RAS/ADC will need to gather the following documentation and send these items to the alumnae team at Executive Offices as soon as possible:

- ☐ **President's Statement:** A separate statement/letter from each alumnae group president indicating their desire to merge the two groups.
- ☐ **Vote Results:** Results of the vote to merge alumnae groups from each group. If the vote was electronic, the results of the poll are acceptable. A majority of the total votes received in favor of merging constitutes passing (regardless of the number of members on the roster or on the email list). If the vote took place at an in-person

meeting, the meeting minutes recording the outcome of the vote will suffice.

- ❑ **RAS/ADC Letter:** A letter from the RAS/ADC in support of the merger with rationale for her decision.
- ❑ **Merging Group Funds:** All remaining funds in the merging group's account should be transferred to the new group's account. The merging group may submit a notification of a zero balance and closed account confirmation. If the merging group has an outstanding debt to the Fraternity, they should request that the new group cover these payments or submit a written request to Council to waive past due fees.
- ❑ **Merging Group Charter:** The merging group's charter/certification should be returned to Executive Offices, if possible. If the charter cannot be located, the RAS/ADC or alumnae group president should provide a statement that the charter will be returned should it be located.
- ❑ **Name Change Application:** If the new group intends to change names as a part of the merger, the Name Change Application should be submitted.

Once the items listed above are received and reviewed by the alumnae team at Executive Offices, the groups' merger packet will be submitted by the alumnae team to Council Trustee: Alumnae for a Council vote to take place at their next meeting. Council meets about twice per month, so the timeline for receiving Council's final decision is contingent on their meeting schedule. The alumnae team at Executive Offices will notify the RAS/ADC of the outcome from Council. The RAS/ADC is welcome to share Council's decision with the groups.

As the RAS/ADC, it may be helpful to ensure the newly merged group establishes a board position for a representative from the merging group to help plan events for that geographic area. The newly merged group should also review bylaws to determine if any updates are needed to outline specific operating procedures with the merging group.

This concludes the merger responsibilities for the RAS/ADC.