



Alumnae Group Status Change Checklist

alumnae association to alumnae chapter

ALUMNAE GROUP STATUS CHANGE CRITERIA

It may be appropriate or necessary for an alumnae chapter to change its status from an association to a chapter. The differences between an alumnae chapter and an alumnae association are outlined below. It is important to note that an alumnae association that changes its status to a chapter must plan to send a voting delegate to Convention.

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Benefits and Requirements	Association	Chapter
Access to Anchorbase officer and reporting portal	Yes	Yes
Voting delegate at Convention	No	Yes
Minimum number of events per year	3	6
Minimum number of officers	2	4
Annual insurance fee paid to the Office of Housing	\$20	\$40
Annual Fraternity due and fees*	Flat fee for all associations	Fee increases by number of members

*Contact the alumnae team at Executive Offices for specific numbers for the current fiscal year. The amount is based on the number of local dues-paying members for the previous fiscal year.

The following benchmarks are important to keep in mind for associations that would like to change to chapter status and should be at the forefront of status change conversations between the group officers and their Regional Alumnae Specialist (RAS)/Alumnae Development Consultant (ADC).

For each year of the biennium prior to applying for a status change to chapter, alumnae associations will ideally:

- Fill the five standard officer positions (president, vp: communications, vp: finance, vp: membership, vp: programming) with five separate members.
- Have a record of 20 members who have paid local dues and 20 who have paid per capita dues.
- Host at least six all-member events with at least three members outside of current officers in attendance at each.
- Utilize Anchorbase to consistently report the group's events.
- Utilize memberplanet for local dues collection (in a Quickpay Invoice format) and communication to members.
- Achieve at least a pink/Meets Expectations score on the Alumnae Group Evaluation (AGE).

STEPS FOR THE ALUMNAE GROUP

Status Change Communication: If, after reviewing the status change criteria above, an alumnae association would like to change its status to a chapter, the alumnae association president should alert their RAS/ADC.

Vote to Change Status: An alumnae association must vote on the proposed status change. If the vote to change status does not pass, please inform the group's RAS/ADC of the outcome. If the vote to change status does pass, please move on to the next step.

Gathering Documentation: If the alumnae association votes in favor of the status change to a chapter, the following documentation should be submitted to Alumnae Services at Executive Offices as soon as possible by emailing alumnaedep@deltagamma.org:

- **Alumnae Group Status Change Application:** The application form (included below) should be completed, including a description of the reasoning for the status change request.
- **Vote Results:** If the vote was electronic, the poll results should be submitted with this application. A majority of the total votes received in favor of the status change 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, please submit the meeting minutes recording the outcome of the vote.
- **RAS/ADC Letter:** A letter from the RAS/ADC in support of the status change with a rationale for her decision should be submitted.
- **Name Change Application:** If the association intends to change names as a part of the status change to a chapter, the Name Change Application should be submitted. If an alumnae group is applying for a status change and the only change to their name will be "chapter" or "association," the Name Change Application is not needed.

Once the application, vote results and RAS/ADC letter are received and reviewed by Alumnae Services at Executive Offices, the association's status change 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. Alumnae Services at Executive Offices will notify the RAS/ADC and alumnae chapter president of the outcome from Council.

Once Council has voted to finalize an alumnae group status change, the following steps should be taken by the new alumnae chapter and completed **within 30 days** of being notified of Council's decision:

- **Local Bank:** The vp: finance will need to reach out to the alumnae group's bank with information about the updated name of the group from association to chapter. This change should be reflected on all banking documents. Each bank has its own name change process. The alumnae team at Executive Offices can provide a letter to present to the bank upon request.
- **IRS:** The president or vp: finance will need to contact the IRS to notify them of the updated name of the group from association to chapter. The alumnae team at Executive Offices can provide a letter to present to the IRS, upon request, to supplement the EIN verification letter (SS-4) that should be on file with the local alumnae group. Executive Offices staff rely on the alumnae group to complete this task, as the IRS will only speak to officers of the local group. Each spring, Executive Offices staff check all alumnae group information on file with the IRS and submit updates as needed. This is a way to double-check that the changes requested by the alumnae group have been registered with the IRS.
- **Social Media:** The group will need to update all social media accounts to reflect the updated name of the group from association to chapter.



Alumnae Group Status Change Application

alumnae association to alumnae chapter

Current Association Name _____

Proposed New Chapter Name* _____

Alumnae Group President's Name _____

Alumnae Group President's Email _____

Date Submitted _____

*If an alumnae group is applying for a status change and the only change to their name will be "chapter" or "association," the Name Change Application is not needed. In all other instances, please also complete the alumnae group Name Change Application.

Please provide a rationale for the status change below.

To change status from an association to a chapter, the alumnae group must show that they have twenty members who have paid their annual per capita alumnae dues this fiscal year. Please list these twenty members below. If necessary, 50-year members who have paid their local dues this fiscal year can count among the twenty.

	Full Name	Member Number	Chapter of Initiation	Email Address
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

To apply for a status change from an association to a chapter, the alumnae group must be current on all association dues, web resource fees, and insurance fees.

By checking this box, I certify that our alumnae association is current on all annual Fraternity dues and fees.

By checking this box, I certify that I understand our group will be charged chapter dues and convention fees moving forward, subject to Council approval, and that this will increase the amount of money owed to the Fraternity annually.

Alumnae associations applying for chapter status must have a minimum of a president and three other officers. Ideally they will have the following five officer positions filled. Please complete your group’s officer information below.

Position	Full Name	Member Number	Email Address
president			
vp: communications			
vp: finance			
vp: membership			
vp: programming			

By checking this box, I certify that these five members have been listed in their officer roles in Anchorbase.

Alumnae chapters are expected to host six events per calendar year. Please outline below, or on an attached sheet, six events hosted by your group in the previous year. Or please detail six potential events planned for the upcoming year.

Alumnae associations applying for chapter status should have received a pink or bronze level on the prior year’s Alumnae Group Evaluation (AGE).

Please choose your association’s most recent AGE level.

Bronze

Pink

Blue

Please submit this application form, proof of local vote results approving the status change, and a letter from your RAS/ADC to alumnaedept@deltagamma.org.