



Alumnae Group Status Change Checklist

alumnae chapter to alumnae association

ALUMNAE GROUP STATUS CHANGE CRITERIA

It may be appropriate or necessary for an alumnae chapter to change its status from a chapter to an association. The differences between an alumnae chapter and an alumnae association are outlined below. It is important to note that an alumnae chapter that changes its status to an association will no longer have a voting delegate at Convention, regardless of the time of year the change is approved by Council.

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 Alumnae Services at Executive Offices for a specific number for the current fiscal year. The amount is based on the number of local dues-paying members for the previous fiscal year.

STEPS FOR THE ALUMNAE GROUP

Status Change Communication: If, after reviewing the status change criteria above, an alumnae chapter would like to change its status to an association, the alumnae chapter president should alert their Regional Alumnae Specialist (RAS)/Alumnae Development Consultant (ADC).

Vote to Change Status: An alumnae chapter 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 chapter votes in favor of the status change to an association, 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 chapter intends to change names as a part of the status change to an association, 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 chapter'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 association 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 chapter to association. 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 chapter to association. 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 chapter to association.



Alumnae Group Status Change Application

alumnae chapter to alumnae association

Current Chapter Name _____

Proposed New Association 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 rationale for the status change request below.

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