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# Alpha Phi Omega

National Service Fraternity

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## Sponsor Handbook

FALL 2006

## Sponsor Handbook Outline – Supplement to the Guidebook

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## **1.A. Job Description of an Extension Group Sponsor**

The purpose of a Extension Group Sponsor is to assist the Interest/Petitioning groups to accomplish the necessary requirements as described in the Guidebook. This will often times be by phone or email. It is expected that you meet with the Chapter members in some form of activity at least twice per month.

A report on the current status of the Interest/Petitioning group should be given to the Regional extension chair each month in the form of communication agreed between the two of you. Service project evaluations should be completed in a timely fashion after the project is complete. You are expected to continuously review and share with the petitioning group the requirements to charter. Please continue to stress the need for shared leadership and that all members of the group are actively participating.

It is encouraged that each member of the group have the opportunity to plan and lead a project and that a majority of the projects be challenging. It is okay for the group to have a project where they are used for support for another group at an event; however, the ideal is to get experience at organizing and developing the service program of the Interest/Petitioning Group.

We are the role models to this extension group. Our attitude and conduct as a Sponsor should be professional, optimistic and humble. Please be careful not to bring up “war stories” from your own Chapter or suggest that this new group become like your own Chapter. We need to help this group to develop their own program.

The responsibilities of a Sponsor officially ends upon charter/recharter of a Chapter. At this point should be fully capable of recruiting and maintaining Chapter membership, providing a program of service, promoting leadership and encouraging friendship within the Chapter. However, the newly chartered Chapter is still in some what of a delicate state. We are suggesting that the Sponsor continue to work closely with the Chapter through the section chair as the group recruits new pledge classes and as the transitions of the charter/recharter members graduate and new members lead the Chapter.

Being an Extension Group Sponsor is a very exciting position. You have the opportunity to assist a group of talented and motivated students in creating a program of Leadership, Friendship and Service that not only they will enjoy, but hopefully many students for years to come.

Thank you, for your interest and dedication to Alpha Phi Omega in becoming a Extension Group Sponsor.

## **1.B. Sponsor Responsibilities**

### **Prior to locating student interest:**

- 1) Receive campus approval to seek interested students on campus to start the fraternity.
- 2) Recruit initial students.

### **Upon initial student contact recruited:**

- 1) Guide the students to confirm campus acceptance of Alpha Phi Omega.
- 2) Meet with the students twice a month at meetings and/or projects.
- 3) Provide status to Regional Extension Chair at least once a month.
- 4) Continuously review with the petitioning group the requirements to charter.

## **2. National Extension Goals:**

- 1) 500 Active Chapters by Jan 2015 (Currently 373 Active Chapters Fall 2006)

### 3. Chartering Requirements

#### FORMATION AND REACTIVATION OF CHAPTERS

Leadership, Friendship and Service are universal concepts. As such, all extension efforts and new Chapters will be open and representative of campus demographics. These requirements have been established by the National Board of Directors, National Membership and Extension Committee, pursuant to Article IX, Sections 2 and 3 of the National Bylaws of Alpha Phi Omega. Additional references are noted where appropriate.

#### 3.A. PHASES OF THE PROCESS:

1. **Prospect:**  
Interest has been expressed and documented at the National Office that a person(s) interested in sponsoring or being a part of the extension effort exists.
2. **Interest Group:**  
An application for this status has been submitted and the Prospect has met the requirements as set forth in the Board Policy Manual.
3. **Petitioning Group:**  
An application for this status has been submitted and the Interest Group has met the requirements as set forth in the Board Policy Manual.
4. **Chapter:**  
A complete "Application for Charter" has been submitted, meeting the requirements set forth in the Board Policy Manual.
5. **Aftercare:**  
Time frame after the charter of the chapter, when the sponsor and Sectional Chair continue to provide specific guidance to the new chapter. This phase is not subject to any approvals.

#### 3.A.1. INTEREST GROUP:

(Optimal Time Period to Obtain I.G. Status from time school permission is determined: 2-4 weeks)

An Interest Group shall be deemed to exist when the following conditions have been met:

1. A group sponsor has been appointed by the Regional Director.
2. The sponsor has reviewed the *Guide to Starting a New Chapter* with the group's students and advisors (if any).
3. Permission to bring Alpha Phi Omega to the campus has been granted by the appropriate school official/office in writing.
4. A minimum of three (3) students have been recruited.
5. A minimum of one (1) service project has been conducted and documented.
6. Submission of the complete "Application for Interest Group Status" to the National Office with roster of members and advisors (if any) with contact information, including signatures denoting compliance with the Fraternity's Membership and Risk Management Policies, 1 service project and approval of the application by the Regional Director and Sectional Chair.

### 3.A.2. Petitioning Group:

(Optimal Time Period for the I.G. to Obtain P.G. Status: 10-20 weeks)

A Petitioning Group shall be deemed to exist when the following conditions have been met:

1. The sponsor and/or sectional staff conducts an orientation to Alpha Phi Omega for group's students and advisor(s).
2. Group membership consists of a minimum of six (6) students and one (1) campus advisor.
3. Students select a President and assign other important responsibilities – service, membership, fellowship, finances, documentation.
4. Students plan, implement and document at least four (4) additional service projects, for a minimum of five (5), including at least two (2) of the four (4) fields of service – to the campus, community, nation, fraternity
5. Students plan, implement and document a minimum of one (1) fellowship project participated in by at least 25% of the group.
6. Students complete an initial draft of group bylaws.
7. Submission of the complete “Application for Petitioning Group Status” to the National Office with roster of members and advisor(s) with contact information, including signatures denoting compliance with the Fraternity's Membership and Risk Management Policies, 4 additional service projects, 1 fellowship project, and approval of the Regional Director and a campus advisor. If the Regional Director is not available, the appropriate Sectional Chair may provide the signature. *Petitioning Group fees are \$20 per student, Advisors are free. Petitioning Group pins will need to be ordered and cost an additional \$3 each.*
8. A Petitioning Group ceremony has been conducted.

### 3.A.3. REQUIREMENTS FOR RECOGNITION AS A CHAPTER:

1. An appropriate period of Petitioning (*i.e.* from the date Petitioning Group status is attained to the time the “Application for Charter” is submitted), should not be less than 14 nor more than 22 weeks in duration. Exceptions to these time periods may be approved by the Chair of the National Membership and Extension Committee.
2. Documents required:
  - A. “Application for Charter”
  - B. Letter of approval from the school administration;
  - C. Letters of approval from the Alpha Phi Omega Sectional Chair and Regional Director;
  - D. Standard Chapter Articles of Association signed by Petitioning Group officers and advisor;
  - E. Affirmation of compliance with the Fraternity’s Membership Policies signed by all Petitioning Group members and advisors;
  - F. Affirmation of compliance with the Fraternity’s Risk Management Policy signed by all Petitioning Group members and advisors;
  - G. Chapter bylaws, signed and approved by Petitioning Group officers;
  - H. A written copy of the Petitioning Group’s goals (including goals for service, fellowship, membership recruitment, pledge education, leadership development, and membership retention) as established during a Petitioning Group Program Planning Conference and approved by the Sectional Chair;
  - I. Completed membership applications for each Active, Advisory, Transfer, and Honorary Member along with appropriate fees of *\$35 initiation fee per student (in addition to the \$20 submitted with PG application), and \$25 for honorary membership* as listed on each application and;
  - J. Federal EIN or EIN application.
3. Fifteen or more students in the Petitioning Group, no less than twelve of whom are returning to school in the fall, and should strive to represent the host institution’s student population.
4. Four or more advisors, including at least: two from the faculty, administration, or staff of the educational institution; one representing Scouting or other youth services; and one from the community.
5. An additional seven (7) service projects for a total of twelve (12):
  - A. At least six of which must be initiated and planned by the group;
  - B. At least two of which are in each of the four areas of Fraternity service; and
  - C. At least four of which are participated in by at least half the group members and at least another three of which are participated in by at least 25% of the group.
6. An additional three (3) fellowship activities for a total of four (4) participated in by at least 25% of the Group;
7. Participation in at least one sectional/ regional/ national Fraternity event by more than two members of the group. In exceptional cases where geographic or other compelling circumstances make this requirement impractical to fulfill, the National Membership and Extension Chair may substitute another form of interaction (for example internet communications) with chapters or Active Members outside of the group’s campus;

### **3.B. Charter Application Approval Process:**

1. Approval of the Sectional Chair (letter required);
2. Approval of the Regional Director (letter required);
3. Approval of the National Membership and Extension Committee through the National Executive Director;
4. An affirmative vote of two-thirds of the chapters in the Section in good standing; and
5. An affirmative vote of two-thirds of the members of the National Board of Directors.

Any Petitioning Group failing to obtain all necessary approvals may appeal the decision to the National Board of Directors at its next regularly scheduled meeting. The National Board, solely, with a three-fourths vote of those present and voting, may approve the “Application for Charter”.

#### **Exemption:**

Duly recognized Interest and Petitioning Groups in existence at the time of the approval of this policy by the National Board of Directors may choose to be considered for chartering under this policy or under the policies in effect immediately prior to adoption of this policy by the Board of Directors.

### **3.C. AFTERCARE PROCESS:**

(Time Period includes: The remaining time of the current semester/quarter that the chapter received their charter and the next two full Semesters/Quarters)

The following are objectives that a healthy new chapter should be able to accomplish in this time period:

1. Complete a successful pledge recruiting program of 6-10 weeks with a goal of 25% or more membership increase.
2. Enact a membership retention program to retain 75% or more of the charter members still enrolled on campus.
3. Accomplish new elections, with a goal of shared leadership and leadership development with new members.
4. Continuation of a comprehensive service and fellowship program.
5. Completion of a Chapter Program Planning Conference.
6. Continuation of activity with other chapters at intra-chapter/section/region/national events.
7. Completion of all requirements and reporting that are expected of Active Chapters.

The sponsor and Sectional Chair will share the responsibility in encouraging and supporting the new chapter in these objectives. The Sectional Chair and sponsor are expected to submit a collaborative, one page summary of the chapters progress, hi-lighting these objectives. This summary is to be submitted to the National Membership & Extension Program Director during the month of December or May as applicable, at the completion of each of the first two full semester/quarters after the chapter chartered.

This will mark the completion of the Aftercare Process. There is no approval method for this process, ability for any additional requirements to be levied, or status to be altered.

### **3.C. DENIAL OR REVOCATION OF GROUP RECOGNITION:**

The National Membership and Extension Committee reserves the right to deny or revoke the recognition of any group seeking to form a Chapter of Alpha Phi Omega at any point in this process for one or more of the following reasons:

1. Evidence of deliberate or knowing non-compliance with the national policies and regulations of Alpha Phi Omega (including but not limited to those relating to membership, extension, membership education and risk management), school regulations, and/or national, state and local laws.
2. Evidence of significant disparity between group membership and campus demographics.
3. Failure to maintain regular communications with official Fraternity representatives, including appropriate Regional and Sectional leaders, designated Sponsor(s), and the National Office.
4. Lack of evident effort to pursue completion of the extension process.
5. Inability of the Fraternity for any reason to ascertain or otherwise verify group status or membership, including but not limited to group members' enrollment in the host academic institution.
6. Determination that it would not be in the best interest of the Fraternity to establish a Chapter of Alpha Phi Omega on the campus in question.

At any campus where recognition of a Prospect, Interest Group or Petitioning Group is revoked, all activity in the name of Alpha Phi Omega (or any variation thereof) shall cease. Further activity, including but not limited to organizational meetings, membership recruiting and education, service projects, and fellowship events, shall be considered a misuse of the name of Alpha Phi Omega.

### **3.D. ADDENDUM:**

Additional Comments from the National Membership and Extension Director:

The process of forming a Chapter of Alpha Phi Omega is a time-consuming and deliberately involved process. The steps outlined herein are considered important not just for the group seeking to become a part of the Fraternity, but also for the fraternity in seeking to learn more about the group and the school to which a charter may be issued. The purpose of this effort is to verify that it would be proper and in the best interest of the Fraternity to establish a presence on a particular campus. Therefore, while some flexibility exists to adjust requirements based on extenuating circumstances, requests for complete exemption from the individual requirements are not readily granted.

It should also be noted that the process of forming a Chapter is not necessarily expected to be completed from start to finish by a single group of students. Many who will be involved in the chartering process, and indeed be vital and influential contributors to that process, will not become active members in the Chapter at the time of chartering.

This is a common and natural situation in new Chapters, and not cause for concern. In cases where the contributions of former group members who have since graduated need to be recognized, Honorary membership (granted upon successful activation of the Chapter) is recommended as the appropriate alternative to Active membership.

## **4. Finding the Initial Students**

### **4.A. Targeting the School**

There are a couple of different ways we can go about starting Alpha Phi Omega Chapters on campuses. The first method is for a student or faculty/administrator to contact us with the interest of starting a Chapter on their campus.

The second method is to actively pursue starting a Chapter at a targeted school. The information here is tailored towards the second method, but useful in both cases.

The first thing, usually in a group effort by the Regional Director, Section Chair, Regional Extension Chair is to target the schools we would like to have a Chapter at. The method of choosing which schools to target could include: a school that once had a Chapter, a school nearby one of the Extension staff personnel, a school nearby another active Chapter or a school with a good potential for starting a Chapter. A good potential could include a school that encourages community service or a larger student body.

In targeting schools, we recommend that you first start looking at schools that have at least 5,000 students and have a large on campus housing population. While we do have Chapters on 'commuter' campuses, we tend to have a greater success with traditional colleges and universities that students live on campus. They tend to get more involved in extra-curricular activities on campus and have less family and work responsibilities.

### **4.B. Educating the Sponsor**

This brings us to the point where the Sponsor comes in. The Section and Region staff have gone through the effort of determining whom they would like to be the Sponsor for this school. We expect this person to be close enough to the school to meet with them a minimum of a couple times a month. Our intention is to educate the Sponsor with this handbook and training sessions, so that you, as the Sponsor knows or has a very good idea what it will take to charter a Chapter even before you make the first contact.

### **4.C. Seeking approval from the Administration to start an Alpha Phi Omega Chapter**

Now that we have targeted the school and obtained a Sponsor, we need to contact the Dean of Students or the administrator that would oversee the activities of Alpha Phi Omega and seek their permission to start a Chapter there. We suggest inquiring by phone first, then asking for 10 minutes to meet with them to discuss their guidelines for starting a Chapter on their campus and also to share Alpha Phi Omega promotional material with them, so they can learn more about us. They will most likely refer you to another individual or governing organization, which is fine. You can contact the Alpha Phi Omega National Office for promotional material to share with the administration and also to assist you with your initial recruiting.

Questions that you should ask, when meeting with the representative that will oversee the activities of Alpha Phi Omega include:

- Can we recruit on campus, without having the first student?
- How many students are required by the school to start a Chapter?
- Can we use meeting rooms on campus as we start?
- Are we limited on meeting rooms before we are recognized as a campus group?
- Are there regulations on fliers and promotional items?
- Are there special privileges like free printing available?
- When do we need Bylaws?
- Do you have any additional requirements on us?
- Is there a faculty or administrator that they would recommend that might be interested in our organization as an advisor?

There may be other service clubs on campus, which is fine. Many schools have more than one service organization, as well as most all social fraternities and student governments will have a service program. Alpha Phi Omega has many aspects to offer the students and the school including the leadership and fellowship principles and the programs they provide.

#### **4.D. Recruiting from Community Volunteer Organizations for Students**

A good place to recruit for the initial student is through community volunteer organizations off campus. Many high school and college students will volunteer through these organizations. Organizations including the Boy Scouts of America, Girl Scouts of USA, United Way, Big Brother/Big Sister, Habitat for Humanity, United Way are all examples.

You will need to network a little bit here. It helps to know people personally in one of these organizations. Try providing your contact information to them to pass on to one of their volunteers that is a college student at our target school. They will be more willing to provide your contact information to a student over providing the students contact information to you.

These students will tend to be one of your initial group leaders as they are often times more motivated to the service principles, as they are already committed to this activity. The community volunteer organization is probably not going to be too worried about losing this persons help, as they will quite often recruit additional students from the school to help in their activities too.

The Boy Scouts of America and Girl Scouts of the USA tend to be good recruiting grounds for us because they are typically focused at ages below 18. Alpha Phi Omega can provide a transition of community service they were involved in as a youth to college age.

#### **4.E. Publicizing – Examples on Campus**

Again, remember to contact the administration on any campus regulations for promotional items: While you promote Alpha Phi Omega, continue to stress that “Membership...” is “...open to all students, upon the approval of the respective collegiate Chapter and after fulfilling the membership requirements prescribed by the National Fraternity and by the Chapter.” Thus, the Chapter is required to be representative of the campus population, including but not limited to gender, ethnicity, age, etc. For further and more specific descriptions, please see your copy of the National Bylaws, Article III – Membership, and the Standard Chapter Articles of Association, Article III, Membership.

- Recruitment tables displaying APO information, including both male and female sitting at the table

- Alumni or another Chapter can help, prior to having students involved on campus

- Using chalk on sidewalks to promote an informational meeting

- Campus Newspaper Ads

- Campus Radio spots

- Fliers on campus, use graphics and catchy phrases

- Fliers to administration and faculty (they know quite a few students)

- Fliers to resident assistants of residence halls

- Fliers to the Student Government

- Leave phone, email and Web site addresses in all advertisements

- Have well known and highly visible projects on campus

- Offer free pizza on informational night

- Word of mouth through students and faculty

#### **4.F. Example Newspaper Ad**

Volunteer Community Service – Alpha Phi Omega, a national co-ed service fraternity is searching for men and women students and faculty advisors with the desire to help others and the leadership ability to help start this organization at (Your College or University). Founded on the ideals of Scouting, dedicated to serving our communities and open to all students, APO is on more than 350 campuses, greater than 16,000 active members and 300,000 alumni. For info contact (Your name), (your phone number), (your email address) or visit our web site [www.apo.org](http://www.apo.org).

Trim and revise as it suits you, this would generally cost about \$25 for two days. Also check with the newspaper to see if they have free printing for school organizations.

#### **4.G. Insignia Requirements**

Per the National Board of Directors, Board Policy Manual, Appendix F, July 2002:

Interest and Petitioning Group Restrictions:

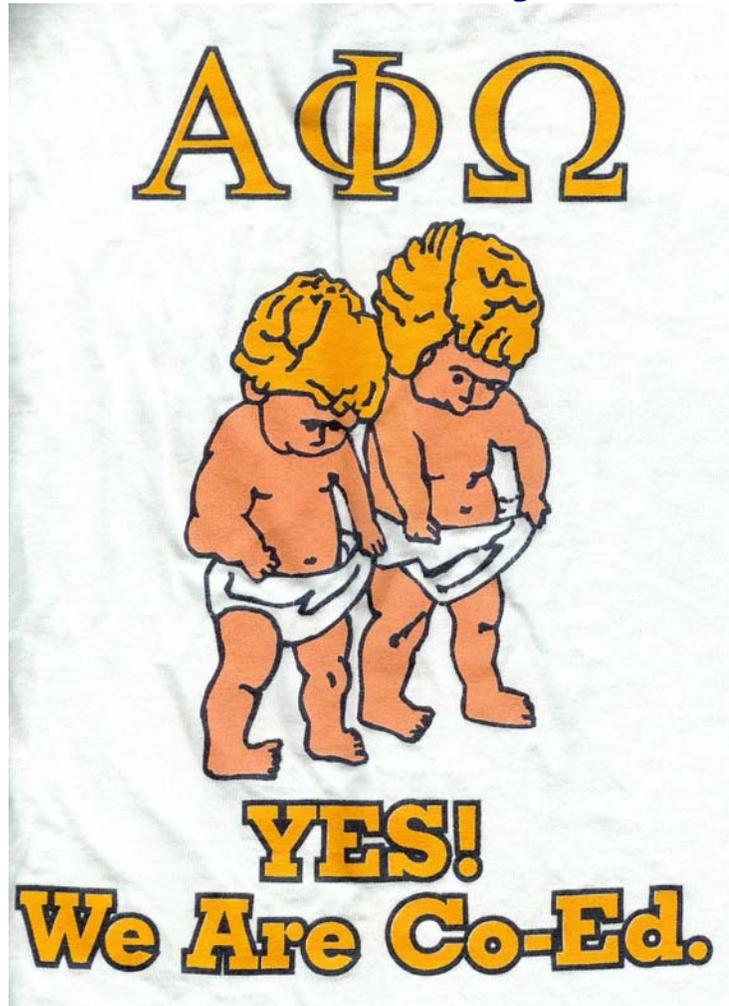
1. All publicity regarding Interest and Petitioning Group activities shall clearly identify the organization as an Interest or Petitioning Group.
2. Alpha Phi Omega jewelry, apparel or related items which indicate individual membership shall not be worn by Interest Group members. Petitioning Group members are encouraged to wear the official Petitioning Group pin, separately or with Alpha Phi Omega apparel, as an indication of their status within the Fraternity.

(Items excluded from the above restriction include those on which the Fraternity name or symbols are used in a primarily decorative manner, including program and event-specific apparel, insignia and related souvenir items.)

Please treat all publicity prior to obtaining Interest Group status as “Prospect Group” in the same manner as stated above for the Interest Group. Thus, at either Prospect or Interest Group status, include Prospect Group or Interest Group on all publicity and apparel.

4.H. Example Flier to recruit new members

**Alpha Phi Omega  
National Service Fraternity  
Recruiting Info Meeting  
Stewart Center, Room 314  
Wed Sep 1<sup>st</sup> 6-7PM & Sat Sep 4<sup>th</sup> 5-6PM  
Free Pizza – Please join us!**



For More Info: <http://www.apo.org/> or call (123)456-7890

#### **4.I. Informational Meeting**

Hopefully you have located at least one or two students that are interested in helping to start an Alpha Phi Omega on their campus. Usually in the first two to three weeks into the term, you should plan on making a large blitz to recruit. Students are typically looking to get involved on their campus soon after arriving and making their first round of classes.

With the first couple of students that you have recruited, or by assistance from alumni or a neighboring Chapter, you can have this callout. Keep in mind that students are going to tend towards a group that they can associate with. Your best choice is to have students presenting most of the informational meeting in a fun and organized way.

You will need to advertise and publicize your event, examples explained in the Recruiting section. You will most likely find, that 60 to 80 percent of the people that you get to your informational meeting will be because someone personally told them about Alpha Phi Omega and asked them to come to the event. The other 20 to 40 percent will be because of the fliers they saw or because of a previous involvement in a volunteer organization. The point here is: word of mouth is going to be your best recruiting, don't expect your fliers to do all of your work for you.

Many students have classes arranged in a MWF or TRS schedule. Some students are more available on the weekday or weekend depending on classes and work schedules. Therefore, you should plan on having a couple of informational meetings for them to choose from. The informational meeting can be the same format, no need for two different presentations.

Strongly consider making this info meeting one hour in length. Students are busy and often have an attention span about this long, as they are conditioned with most of their classes this way. You should be able to promote Alpha Phi Omega and provide the necessary information to them in this amount of time. They will be impressed with your organizational skills and won't believe that they are wasting their time.



## **5. Becoming an Interest Group**

### **5.A. Officer structure to start with:**

You have just completed your initial drive to recruit a beginning core of students and advisors. Assuming that you now have at least three students, you should begin evaluating your organizational structure. You can and will change this as required to meet the needs of your group. You should have as a minimum, a President and Secretary to begin meeting as a group and keeping minutes of all activities.

If you already have 6 to 7 students in the group: the group should consider the positions of Service Vice President, Membership Vice President, Treasurer and any other officers that the group deems necessary.

The Officer Leadership Series packets included in the Guidebook should be distributed to the appropriate officers. The President should have by now given Pledge Manuals from the National Office to all of the members as well.

The President needs to be very aware of the need to share and delegate responsibilities with all interested students. One of the most important tasks the president will do is to delegate. The other members will be much more likely to stay involved if they have tasks and responsibilities.

You may have some turnover in the initial officers, which is fine. As you get new members in, make those positions available to those that believe they would like to accept the position. It is not uncommon to have changes in the officer positions as the group grows.

### **5.B. Recruiting:**

#### **5.B.1. Recruiting additional students**

Even though you have had your initial big drive in recruiting new members at the beginning of the school term, you should still continue to recruit for more students. Word of mouth is still going to be one of your best ways to grow in size. This can be a casual and continuous approach for your members that you currently have. You don't always have to be sitting tables.

You can invite new members on your fliers that are promoting your service projects. Your service projects will most likely impact other students, thus giving you another opportunity to recruit. This is an important consideration when planning your initial projects.

There is no time limit or restriction in recruiting new members to your group. New people can come in at any time during the entire Prospect/Interest/Petitioning Group process clear up to charter. They will need to be submitted in as additional members to the National Office and ceremonies performed for them as you progress through the Interest Group and Petitioning Group status.

### **5.B.2. Recruiting Advisors**

You will need to begin recruiting for your Advisors as well. There is a very good chance that you have Alpha Phi Omega alumni at your school as faculty or administration. They could have previously been in this school's Chapter, if you are trying to re-charter a Chapter; or have moved here from another Chapter. They are often very good sources for campus Advisors.

A good way to search for them, is to contact the Alpha Phi Omega National Office and request an alumni search for your city or ZIP code area. Be certain to get the mail and status codes with the alumni lists. That way you will know that the information is current. You can then check this list against your school faculty and administration phone books.

You will also have faculty that are very interested in community service. Finding them may be a little more effort, but consider them like the students you are recruiting. Get the word out that you are looking for campus advisors with this interest. Most faculty know each other fairly well and will soon suggest contacts for you.

The Prospect Group may also have instructors that they really enjoy and would like to have them as Advisors. Prior experience in the fraternity and community service is by no means a requirement. You may also be recruiting from your faculty and administration for Advisors that can help you with recruiting, publicity, transportation, fundraising or just cutting through red tape once in a while. Please see "In Search of an Advisor" in your Guidebook for additional assistance in recruiting Advisors.

When you have determined an individual that you want to recruit as an Advisor, you will want to have a copy of the Advisors Handbook that you received with the Guidebook to present to them. You will also want to discuss and mutually agree on expectations of their role with the Chapter. This means that you need to have an idea of how you would like them to help the Chapter before speaking with them.

### **5.B.3. Open to All Students:**

As previously stated in the publicizing section of "Finding the Initial Students": While you promote Alpha Phi Omega, continue to stress that "Membership..." is "...open to all students, upon the approval of the respective collegiate Chapter and after fulfilling the membership requirements prescribed by the National Fraternity and by the Chapter." Thus, the Chapter is required to be representative of the campus population, including but not limited to gender, ethnicity, age, etc. For further and more specific descriptions, please see your copy of the National Bylaws, Article III – Membership, and the Standard Chapter Articles of Association, Article III, Membership.

## **5.C. Service Projects:**

### **5.C.1. Organizing the first projects:**

To become an Interest Group, one of the requirements was to complete your first service project. You can start with simple projects like campus or community clean-ups or even providing assistance to another community service organizations event. You will get to the point that the group can plan and organize an event that will involve many other people. For now, let's get a couple of projects in, under our belt.

Your Service Vice President might be organizing your first few projects; however, each member of the group should get involved in this process of setting up and carrying through a project. You can encourage each member to set up a project that they enjoy and invite the rest of the group. There are lists of examples in the pledge book and on-line at the fraternity web site: [www.apo.org](http://www.apo.org).

### **5.C.2. Evaluating the Service Projects**

After you have completed the project, the organizer of the event should complete the project report form. An example of this form is provided below. You can use the form in the Guidebook, create your own project form or you can use the electronic form available online as shown on the next page. Either way, ensure that the forms are being completed by asking for a copy of each of the project evaluation forms each time you meet with them.

# Alpha Phi Omega

## Service Project Report Form

We would like to encourage you to use the APO National Website Reporting Page:

[http://members.apo.org/service/service\\_reporting.php](http://members.apo.org/service/service_reporting.php)

**Contact Name:**   
 (Coordinator)

**Contact Email:**

**Project Type:**

**Project Title:**

**Project Date:**

**Project Location:**

**Project Description:**

**Project Results:**

**Area of Service:**

**Chapter/PG/IG:**

### Project Statistics

<p><b>Preparation Hours:</b>          The total number of service hours performed by all members of your chapter in preparation for the actual event. These would normally include service hours done <i>before</i> the actual event.</p>	<input type="text"/>
<p><b>Total Active Members &amp; Pledges in Chapter:</b>          Basically, all student members of your chapter. Do not count advisor or alumni members here.</p>	<input type="text"/>
<p><b>Total Chapter Members Participating in Project:</b>          This number should include all participants of the project that are either: active, pledge, associate, advisor, honorary, or alumni.</p>	<input type="text"/>
<p><b>Total Service Hours by All Chapter Members on this Project:</b>          Add up the total number of service hours performed by all of the chapter members (specified in the previous question), and put that total here. Do not count hours recorded under, "preparation hours."</p>	<input type="text"/>
<p><b>Total <u>Non-Chapter Members</u> Participating in Project:</b>          This number should include all participants of the project that are not members of</p>	<input type="text"/>

your chapter. You should include all those non-members that participated in a project that your chapter planned and executed. However, if you participated in a major project sponsored by another organization (e.g. Relay for Life, American Cancer Society), do not include the total number of people at the entire event; only include those non-members that directly participated with your chapter.

**Total Service Hours by All Non-Chapter Members on this Project:**

Add up the total number of service hours performed by all of the non-members that participated (specified in the previous question).

## Project Details

1. Please provide a brief outline of the planning steps that you undertook in preparation for this project.

2. Did your chapter use any resources listed in the *National Service Week Handbook* or the *Spring Youth Service Day Handbook*?

If so, what resources did you use?

3. Did any other people or organizations (*not included above*) participate in the project?

If so, with whom (what group) did you work with? Please describe the nature of their involvement.

Cosponsor Contact Name:

Cosponsor Contact Email:

Cosponsor Contact Phone:

4. Did your chapter request, acquire, and/or utilize any official proclamations (city mayor, state governor, etc)?

If yes, please provide details:

5. Did your chapter generate PR for this project (actual media coverage of the event)?

If yes, please list contact names and phone/email addresses for: radio stations, TV stations, newspapers, etc, that provided media coverage for your service project. Please send any news articles and describe any radio/TV coverage (note: campus newspapers/radio stations also count as well).

6. Was this project youth-oriented (e.g. was the primary purpose for the benefit of pre-college youth and/or incorporating younger children)?

If yes, please provide the total number of youth reached as a result of this project:

7. Was this project a fundraiser for a charitable organization?

If yes, how much money was raised during the project?

\$  (round off to nearest whole dollar)

If yes, which charitable organization was the money raised for?

8. During the execution of your project, what areas/procedures went well?

9. During the execution of your project, what areas/procedures could have been improved?

---

Please list the names of all participants that participated in this project:

Please provide any additional information that you believe we should know that was not covered by one of the above questions:

## **6. Becoming A Petitioning Group**

### **6.A. Re-evaluate officer structure**

#### **6.A.1. Additional Officer Positions**

Congratulations on becoming an Interest Group!!!! You are working towards a minimum of six students in becoming a Petitioning Group. As you recruit more members, once again, take a look at your officer structure. You should be working towards having a President, Service Vice President, Membership Vice President, Treasurer, Secretary and any other officers that the group deems necessary.

If you have new officers or a change of officer positions, provide them with the Officer Leadership Series packet for their position.

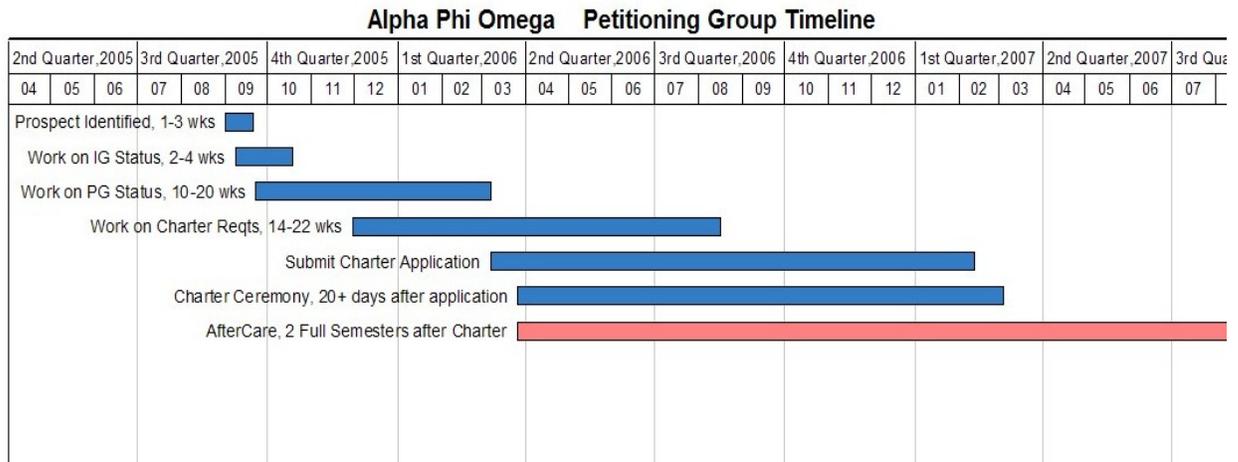
#### **6.A.2. Begin Forming Committees**

Everyone is not going to be interested in an officer position. You may now want to be considering forming committees. You can have committees for Service, Fellowship, Fund-raising, a Special Event or any other committee that you would like.

The key here is to get everyone involved, so that they all have a task and a role in the Fraternity. Your officers are learning to delegate and you are developing an organization that will self perpetuate itself.

## 6.B. Creating a timeline to charter as a goal:

This is where the insight of the Sponsor can really help the group. Soon after achieving the Interest Group status and working towards the Petitioning Group status, you should consider mapping out a timeline with the group to charter as a goal. Below is an example timeline.



We can now begin to set more specific goals. With the entire group, review the requirements for becoming a Petitioning Group and to charter the Chapter. Everyone should have a copy of these requirements and understand the process.

Now you can get your calendar out for the next year and pick a time frame that you would like to target for charter. Optimal time frame for Prospect identification is 1-3 weeks, to obtain Interest Group status is 2-4 weeks, followed by optimal time to attain Petitioning Group status of 10-20 weeks, and then 14-22 weeks working on the Chartering requirements to submit your application. You should evaluate how the group is progressing to target these dates. How well are they organizing service projects and working together as officers and committees?

Don't be too aggressive on targeting a charter date; however, you want to challenge them a little bit too. Remember, these are just targets and goals; they are not set in stone. You can and probably will change them as you progress.

Now that you have somewhat of an idea when you want to achieve Petitioning Group status and charter the group, you can begin working in the other details. Those details include recruiting goals of so many people by certain dates or events. You should also set goals for the amount of projects to have completed by certain dates or events.

Review the Petitioning Group and charter requirements again to see that you have the major tasks covered on your timeline. You should share this timeline with the Section Chair and Regional Director at this point for their comments. They have most likely been involved in a few extension efforts and can offer reassurance and helpful additions to your plan.

## **6.C. Big Brother Chapter**

The Section Chair and Regional Director will most likely find a “Big Brother Chapter” for your Interest Group. This is most often a Chapter that is close by that can help guide the group to charter. We expect that the Interest Group will have a lot of fun with the other Chapter and get involved in combined service projects and fellowship events.

This Big Brother Chapter will also help instill the brotherhood of the Fraternity with the Interest Group by their actions. We certainly encourage you to get involved with other Chapter projects and events. This is a very good method to keep the Interest Group motivated and learning about the Fraternity. Consider doing combined events with other schools as they may be visiting during large sporting events.

**The following is the information provided in the Big Brother Chapter Handbook:**

**How does a new interest group get formed? Usually by one of the following:**

- Transfer student with prior APO membership or exposure
- Friend or relative of APO member
- Scout or someone else who knows of APO
- Campus-based LD or Service initiative with no prior APO exposure
- Campus Administrator or Staff person desiring APO on campus
- Proactive effort by local APO volunteer.

**How does a new group learn about what it means to be a part of APO?**

It is often said that people learn best by example and by doing. Our extension program provides the “by doing” but how do we provide the “by example”? This is where a “Big Brother” chapter comes in.

In this handbook, we will look at the potential benefits, risks and rules of engagement – the how-to’s of establishing the Big Brother chapter relationship, aimed at making the experience as beneficial as possible for both the Big Brother chapter and the prospective chapter.

## **Big Brother Chapter Handbook (Excerpt Continued):**

### **I. The Benefits**

Let's start with what most would see as the "easy part" – identifying the potential benefits. But let's break it into two columns – one for the prospective or target group, and one for the existing, Big Brother chapter. (Should include some of the following...)

**Prospective Chapter**  
Examples of functioning chapter  
Pledge Program  
Fellowship  
Service personified  
Rush/Recruitment  
Leadership development  
Meetings  
Procedures, policies and Bylaws  
Advisors  
Experienced bodies for recruitment  
Guests for fellowship  
Good example for school admin  
Encouragement and support

**Big Brother Chapter**  
Service to the Fraternity  
Leadership opportunities  
- Communicator/Liaison  
- All, by example  
Service opportunities on another campus  
Manpower for service on home campus  
Fellowship opportunities  
Reason to self-evaluate, reinvent chapter  
Program planning opportunities for non-officers (recruiting, service, fellowship, etc.)  
Chance to install new chapter at chartering

### **II. Rules of Engagement**

Okay, before we get to the risks, let's talk about Rules of Engagement – not that we have specific rules per se, but the how's of doing this in an effective and positive manner.

#### **1<sup>st</sup>, how does one become a Big Brother chapter?**

Could be any number of ways – and proximity is not always the key. Proximity – to a certain relative extent – is a requirement to be effective, but that does not establish the relationship.

Thus proximity is an enabler, not the deciding or initiating factor – what is?

- 1) Transfer student came from the potential Big Brother chapter
- 2) Existing relationship between member(s) of chapter and prospective group – might be high school connections, Scouting, work, significant others, etc.
- 3) Chapter is approached by someone to be a Big Brother chapter (WHO?)
  - a. Section Chair
  - b. Regional Director (Will be the person who makes the appointment)
  - c. Sponsor
  - d. Extension Chair

## **Big Brother Chapter Handbook (Excerpt Continued):**

### **What are we looking for in a Big Brother chapter?**

- 1) Role model
- 2) Support and encouragement
- 3) Friendship
- 4) Service - - HELP!!! (i.e. manpower)

### **What are we not looking for?**

- 1) Disciplinarians – APO cops
- 2) Perfection
- 3) Spies for the sectional/regional staff (“gotchas”)
- 4) Clone-makers
- 5) Chapter full of wannabe pledge masters

### **What makes a good candidate for Big Brother chapter?**

Stable membership	Good understanding of spirit and standards
Sound leadership	Participation in sectional and regional events
Well-rounded program (LS&F)	Mainstream, Friendly
Solid risk management	Recognition of APO leadership roles (SC, RD, etc.)

### **How formal does it need to be?**

No formal mechanism/rules/regulations

But - should foster appropriate relationship

Sectional Chair needs to be able to say “no”

How it’s “implemented” is really individualized to needs/abilities of all involved.

### **How does Big Brother chapter handle it?**

- Could name committee/chair/liaison
- Could be a presidential duty (danger!)
- Must keep needs of chapter in sight – “do no harm” to chapter for sake of new group
- Include invites to service and fellowship events – also rushing, pledge meetings (see below regarding ceremonies)
- Does NOT make new group a “branch” of the existing chapter – new group should not have responsibilities to the Big Brother chapter or expectations placed on it beyond what they agree to and commit to doing.

### **Ceremonies and political issues**

- The prospective chapter will be expected to learn our Nationally approved insignia, principles, toast song and traditions. This includes recognition of proper way to pursue changes, participating in Fraternity governance, etc.
- Target group will NOT be made members of Big Brother chapter.
- While our ceremonies are not open to all, ceremonies are NOT intended to be a roadblock. There are cases where select non-members may have a legitimate interest or need to see our ceremonies:
  - o School administrators or advisors (prospective or current)
  - o Parents of members
  - o Select leaders of interest/petitioning group if needed to address concerns

The key here is that we have to be able to communicate, show and explain what we do and who we are. If there is a disagreement in any of these areas, the sponsor or section chair should be alerted of these concerns and brought in to address the issues.

## **Big Brother Chapter Handbook (Excerpt Continued):**

### **III. Risks**

**So – everything’s great, we know what’s supposed to happen. But what are the risks?**

**Prospective Chapter**  
Too dependent on Big Brother chapter.  
Focus shifts to being a part of Big Brother chapter.  
Big Brother chapter imparts “bad” traditions – informal ceremonies, etc.  
Big Brother chapter tries to clone itself.  
Big Brother chapter becomes judge, jury and enforcer.  
Hazing  
Big Brother chapter “dictates” to new group.  
Risk of accident/injury with non-students.  
Risk of disillusionment if Big Brother chapter fades.

**Big Brother Chapter**  
Energies too focused on extension – siphons away from chapter, loss of leaders, people, etc.  
Risk of accident/injury with non-students.  
Risk of disillusionment if target group fades.  
Risk of getting embroiled in other group’s issues.  
Loss of existing relationships with other chapters.  
Takes more time away from studies for involved members.

### **VI. Big Brother Chapter Summary:**

**NOT TO BE:** Perfection, APO Cops, Sponsors, Pledge Masters, Hazers, Authority Figures

**TO BE:** Examples, Role Models, Friends, Helpers, Sounding Boards, Educators

**AVOID:** Energy drains, loss of focus, time sinks, cloning

**KEEP IN MIND:** Process -> Goal: Establishing a new chapter  
Leadership is centered on the sponsor, Section Chair, RD, Extension Chair

Should be fun and rewarding!

#### **6.D. Recruiting – Additional Students and Advisors (Always)**

Just a reminder, you should always be recruiting for new members. To become a Petitioning Group, you are expected to have at least six students and one campus advisor.

#### **6.E. Finding your Chapter and local alumni**

As you are drawing nearer towards your Petitioning Group ceremony, it would be nice to invite the Chapter alumni if you are re-chartering and the local alumni to your event. You may also want to be looking for these alumni as community advisors too.

A good way to start is as in 5.B.2. Becoming an Interest Group – Recruiting Advisors:

One way is to obtain an alumni list from the National Office.

Please be considerate with your Alumni. A suggested method in contacting them after you have received the list is by the mail first. Send them a nice one-page flier explaining that you are in the process of chartering the Chapter on your campus and explain a couple of the activities that you have been involved in.

Inform them how they can get involved and help in your program if you wish. This involvement can be attendance for the Petitioning Group ceremony, a community advisor or community volunteer contact, setting up an alumni association and even financial support for the Chapter. You could also include a questionnaire on how they might be interested in being involved. Include your phone number, email and Web site if you have one created.

If you intend on calling them at home, let them know that you will probably be contacting them within a week or two after receiving the letter. Again, please be very considerate in contacting them this way, and do so solely to invite them to an activity.

## **6.F. Working with Over-Zealous Alumni/Advisors**

Here is a tough one that you will have a very good chance of running into. You will also need to watch your own behavior so that you are not acting in this manner as well.

As sponsors, advisors and alumni; our tasks and goal is to guide the group to charter. We need to do just that, "Guide". The Interest and Petitioning Groups can, will and should be allowed to try their own methods. Some events are going to turn out great, others may not do so well. That is Fantastic!!! They are going to learn from each of these results.

As the group is progressing towards Petitioning Group status, you as the Sponsor should become more of a sounding board. They will ask for your input when they believe that they need to ask. The same is for the Advisors and alumni that tend to get involved.

We want to keep the Alumni involved in the program, but only to the extent that it is supportive to the Chapter. You as the Sponsor, are the appointed contact and liaison for the Fraternity to the group.

If you have Advisors and alumni that are getting so involved to the point that they are trying to direct the group in activities, you may need to meet with them individually, possibly with the Interest Group President and discuss the best manner to help the group. Often times, the Advisors and alumni are very excited about the program and are truly trying to help. Alumni and you as the Sponsor, need to be very careful in not trying to make the group that you are working with now, like the Chapter that you came from.

Even in Interest/Petitioning Group meetings, we as Sponsors, advisors and alumni need to hold our comments back for a little while. Most likely, one of the student members will make the same comment you had intended to make.

If you continue to have trouble with an over involved Alumni or Advisor, please contact your Section Chair and Regional Director for assistance. We want to ensure that the group has a positive experience with the Petitioning Group process.

## **6.G. Communication Methods**

An initial challenge to the group will be keeping everyone informed of the activities. The best means of communication will probably be weekly meetings of the group. The secretary can take minutes and share them in email to everyone that was there at the meeting and also to those that missed the meeting.

Most students have access to creating Web sites on their campus accounts these days. Chances are you have a student in the group that could create a Web site for them – if you don't; there is a good person to recruit.

It is also very helpful to try and obtain some office space on campus. Many schools have offices for student organizations; although you will most likely need to share some space.

If you are able to get some office space, place your minutes, projects and other communications on the walls or another available location for others to get to them.

Phone lists are helpful too. Communicating and encouraging members to attend events will take some personal contacting as well.

Communication also extends beyond the Chapter to the Section Chair, Regional Director and the National Office. Please share with them your progress of activities and events.

### **6.H. Learning Fraternity Traditions**

The Sponsor has the additional responsibility of teaching our Fraternity History and Traditions to the group. This can be a very fun activity for both you and the Interest Group. Every member, including advisors should have a copy of the pledge manual, which is also available online at [www.apo.org](http://www.apo.org).

Each week, take a little bit of time to share and possibly quiz the group on the policies, history and traditions of Alpha Phi Omega from publications including the Pledge Manual, recent Torch and Trefoils and National Pledge Standards. The group can even quiz each other. The group can also elect a Historian to help them learn of the fraternity history. Be certain to make it fun in 5 to 10 minutes a meeting.

### **6.I. Encouraging the LFS programs – Shared Leadership and Participation**

Throughout the Chartering Process, we are looking for the group to come together to form a strong leadership program, that will be the basis of their group to continue with after their charter. This is done with proper delegation and shared leadership. Everyone will need to have the opportunity to take a leadership role in helping the group to Charter. You will also notice that we expect a high participation of members in several activities as stated in the requirements.

You will need to promote an organized Fellowship program as well. There is a charter requirement of completing and documenting four fellowship activities attended by at least 25 percent of the group..

The next page is an example of an Organizational Chart/Timetable Petitioning Checklist. This will be useful in helping you create your timeline. With this form you assign target dates and the person responsible for the tasks. One of the main goals here is to promote a Shared Leadership: each member of your group should have a responsibility on this page.

This form is intended on helping the group with the shared leadership; it is not a requirement. You can use this form or create your own to help encourage participation by all members.

**Alpha Phi Omega  
Organizational Chart/Timetable  
Petitioning Checklist**

<b>Task or Requirement</b>	<b>Target Date</b>	<b>Actual Date</b>	<b>Person Responsible</b>	<b>Alternate Target Date</b>	<b>Comments</b>
Arrange for Meeting Rooms					
Preliminary College Approval					
Recruit 3 to 5 Students					
Faculty Advisor 1					
Pre-Petitioning Orientation					
Service Project 1					
Permanent Address/Office					
Interest Group Application & Compliance of Risk Management and Membership Policies					
Section Chair Review					
Regional Director Interest Group Approval					
Attain a minimum of 6 Students					
Service Project 2					
Service Project 3					
Service Project 4					
Service Project 5					
Fellowship Activity 1					
Chapter Bylaws - Begin Developing					
Establish Treasury/Set Fees					
Petitioning Group Application					
Section Chair/Sponsor Review					
Regional Director Approval Pet. Grp. Status					
Petitioning Ceremony					
Attain a minimum of 15 Students, at least 12 returning in the Fall					
Faculty Advisor 2					
Scouting or Youth Service Advisor					
Minimum of 3 students attend one of Sectional/Regional/National Event					
Service Project 6					
Service Project 7					
Service Project 8					
Service Project 9					
Develop a Fellowship Program					

**Alpha Phi Omega  
Organizational Chart/Timetable  
Petitioning Checklist**

<b>Task or Requirement</b>	<b>Target Date</b>	<b>Actual Date</b>	<b>Person Responsible</b>	<b>Alternate Target Date</b>	<b>Comments</b>
Fellowship Activity 2					
Fellowship Activity 3					
Community Advisor					
Develop a Rush Program					
Develop a Pledge Program and a Statement of Pledge Requirements					
Finalize Chapter Bylaws					
Hold Election of Chapter Officers and Appoint Committee Chairs					
Alpha Phi Omega Knowledge Tested					
Service Project 10					
Service Project 11					
Service Project 12					
Hold Chapter Program Planning Conference					
Fellowship Activity 4					
Progress Review by Sectional Chair & Sponsor. Check All Documentation					
Complete All Required Paperwork					
Approval Letter from College					
Approval Letter from Sectional Chair					
Approval Letter from Regional Director					
Active Applications, Fees, Charter Application, Supporting Documents Sent to the National Office					
Approval of National Membership and Extension Committee, National Board and Chapters of the Section					
When All approvals have been granted, begin planning the Chartering Ceremony and Celebration					
Date of Chartering Ceremony					

### **6.J. Sponsor transition from Directing to Guiding:**

As mentioned in 6.F, working with Over-Zealous Alumni and Advisors, the Sponsor is now reaching the point that they need to spend more time “Guiding” the group, than “Directing”. The president, officers and committees should be working very well together and have completed several projects by now.

Our goal is in developing a Chapter that is self sufficient and has a program that will continue long after chartering. The Sponsor needs to allow the group to take more and more responsibility in directing their program as they approach Petitioning Group status and Charter.

The Sponsor should definitely still be in attendance at meetings and events as they can, just becoming more like an Advisor. This means that you are there for them if they have questions or want guidance.

### **6.K. Planning the Petitioning Group Ceremony**

Once you have completed all of the Petitioning Group requirements, you are ready for the Petitioning Group ceremony. This ceremony is a very nice event and should take some planning and preparation.

All student members and advisors should be in attendance, semi-formal. If everyone can not make it, you will need to plan another ceremony for them to attend. This ceremony can be presented by those members that just went thru Petitioning Group ceremony. You will also want your local and Chapter alumni if a re-charter to be present for the ceremony too.

You should plan for 2 to 3 hours for the Pre-Petitioning Group Orientation, provided with the Guidebook and the ceremony. Plan on having two adjoining rooms: one to meet in and the other for the ceremony. You will also want to have a refreshment table following the ceremony or a small banquet at a local restaurant.

## **Pre-Petitioning Group Orientation Outline**

### I. INTRODUCTIONS

### II. PURPOSE OF PETITIONING GROUP

### III. FRATERNITY STRUCTURE

- A. National Board of Directors:  
President, Vice President, 6 Program Directors, 11 Regional Directors,  
Life Members
- B. Regions:  
I to XI (from East Coast to West Coast)
- C. Sections:  
1 to 99 (from West Coast to East Coast)

YOU ARE PART OF: Region\_\_\_\_\_, Section\_\_\_\_\_

### IV. CONTROLLING BODY

- A. The National Convention! Chiefly, the Active Members
  - Fees
  - Names
  - Rituals
  - Process(Two votes per active chapter, one per Board Member and one per Regional Alumni Voting Delegate)  
\*\*The National Board of Directors acts on behalf of the National Convention between conventions.

### V. PROCESS IN BECOMING A CHARTERED/RECHARTERED CHAPTER

### VI. OUTLINE-CHECK LIST AND RECORDKEEPING

- A. History
- B. Finance
- C. Process

### VII. RISK MANAGEMENT POLICIES - Review the Risk Management Policies prior to start of Petitioning process

### VIII. MEMBERSHIP POLICIES - Review the Membership Policies prior to start of Petitioning process

### IX. GOAL-SETTING

### IX. HANDLING NON-PERFORMERS

### XI. CONFLICT RESOLUTION

**Pre-Petitioning Group  
Orientation Outline**

XII. COMMUNICATING

XIII. RECRUITING

(Pass out note cards--Group fills in name and lists potential interested friends—  
collect note cards)

XIV. MISCELLANEOUS

(Terminology, Brothers, Toast Song, Houses)

\*\*\*\*\*

**SMALL GROUP EXERCISE**

Give each member a 3x5 card

- Have them put their name in the upper right corner
- Have them answer Questions 1 and 2 on the front of the card and Questions 3 and 4 on the back.

- Question 1 - What attracted you to Alpha Phi Omega?
- Question 2 - What do you want to get out of Alpha Phi Omega?
- Question 3 - What past leadership roles or service groups have you experienced?
- Question 4 - Do you have any service projects you would like to see Alpha Phi Omega do?  
Which ones?

Collect and review cards and help to network the resources of the members on committees that would benefit from their talents. Keep these records. Question 4 may be a good survey question for future projects and you may even get chairs for specific projects - just another way to meet the needs of the members.

\*\*\*\*\*

**SMALL GROUP SCENARIOS**

The Orientation Program for prospective member is very important, to educate and facilitate the "Team Approach" to petitioning as well as working to improve communications in a "new" group. The key to an expedient process and worthwhile one is making sure everyone knows their roles and responsibilities. We do this through a group dynamic exercise and soliciting pertinent information on note cards.

We break the group into five to six members in random fashion - encourage non-familiarity within the group. Assign each a scenario and a time period of about 20 to 25 minutes to discuss and come up with possible solutions. Let them know that one person will read the problem at the end to debrief and a different person will report on the results.

If the group is larger than 36, have an additional scenario ready or a repeated scenario. Most scenarios cover common obstacles that we have learned from and will prepare the group to work together with a broader understanding.

## **Pre-Petitioning Group Orientation Outline**

### **Scenario 1**

You invite your friend to join our service organization because she enjoys helping other people. She sounds interested and asks the name of the organization. You smile and proudly say "Alpha Phi Omega, National Service Fraternity". She says "NO WAY, ... frats... are too wild, and I have grades to worry about."

**A) What do you say to this?**

**B) How do you plan a positive image, marketing plan for your campus? For your community?**

-----Cut Here -----

**Facilitator:** Scenario 1: The key points that should have been covered are: Membership, public relations, and key words like Fraternity, pledging, brothers, hazing, getting everyone to recognize they are responsible for looking for other potential members and help to share experiences.

-----Cut Here -----

### **Scenario 2**

Your chapter has significantly grown and it's election time for new officers. There is one member that is at every service project and very dependable, but she is shy. Your chapter decides to honor her by electing her as the new Service Vice President. Three weeks later and there are no service projects planned. Also you have not seen the Service Vice President in three weeks. When you approach her...her response is, "I think I need to drop my membership...I screwed up and don't think I can do the job".

**A) What should your group do? What do you say to the Service Vice President?**

**B) How could your group prevent this from happening?**

-----Cut Here -----

**Facilitator:** Scenario 2: The key points that should have been covered are: Job definition, committees, delegation, leadership training, advisor roles, forgiveness, Brotherhood, support.

-----Cut Here -----

### **Scenario 3**

The chair of the service project consistently changes plans the night before a project causing many members to be at the wrong place at the wrong time. This has caused great stress and members are not showing up for anything.

**A) What would you do to help develop the project chair's responsibility and credibility?**

**B) How do you bring up morale?**

-----Cut Here -----

**Facilitator:** Scenario 3: The key points that should have been covered are: Planning ahead, communications, leadership, motivation, teamwork, responsibility

-----Cut Here -----

**Pre-Petitioning Group  
Orientation Outline**

**Scenario 4**

You have some officers who are "best friends", but due to a major personal dispute... they do not talk to each other anymore...worse yet..., they "bad talk" each other publicly. Members are getting uneasy at the deliberate "politics" in discrediting each other.

**A) How should the chapter respond?**

**B) Who should respond?**

-----Cut Here -----

**Facilitator:** Scenario 4: The key points that should have been covered are: Teamwork, humility, leadership development, conflict resolution motivation, problem solving.

-----Cut Here -----

**Scenario 5**

Your faculty advisor (one of three) has been very busy and stopped attending any functions. He was supposed to be the keynote speaker at the last ceremony but did not show up. Several members have him as an instructor and they all enjoy his classes. The members want to keep him because of his great personality and past dedication to our principles. The advisor feels bad (and guilty) and offers to resign. You know he enjoyed Alpha Phi Omega in the past.

**A) How do you get him back?**

**B) How can we prevent this from happening again?**

-----Cut Here -----

**Facilitator:** Scenario 5: The key points that should have been covered are: Using faculty advisors, communication improvement, roles of advisors, advisors are members too, conflict resolution.

-----Cut Here -----

**Scenario 6**

The executive committee (President, Vice President of Service, Vice President of Membership, Treasurer, Secretary) decide... "The heck with getting quorum at a general meeting, let the executive committee make all the decisions for the chapter rather than vote at the general meetings."

**A) What are the risks in allowing the executive committee to do all the deciding?**

-----Cut Here -----

**Facilitator:** Scenario 6: The key points that should have been covered are: Division of responsibility, delegation, democratic process, sharing leadership, bylaws, discuss possible conflict of interest.

-----Cut Here -----

## **7. On the Road to Charter**

### **7.A. Re-Evaluate Officer/Committee positions**

Congratulations on becoming a Petitioning Group!!!! Becoming a Petitioning Group is a big step towards chartering.

To Charter you are expected to have at least 15 students; four Advisors, comprised of a minimum of two from the Faculty/Administration, one from Scouting or a Youth Services organization and one Community Advisor.

As stated in the 6.A.1. and .2,

Becoming a Petitioning Group – Additional Officer Positions and Forming Committees:

Take a look at your officer and committee structures to see that they are meeting your needs.

See that everyone has tasks and responsibilities to the Fraternity in either an Officer or a committee position.

Share with the new officers the Leadership Series Packets for their position. Also check to see that everyone has a pledge manual.

#### **7.A.1. Officer and Committee Chair transitions and notebooks**

It is very helpful for each officer and committee chair position to begin creating their own notebook for their position. This notebook should include their job requirements and expectations of the position.

Each outgoing officer and committee chair should also write an evaluation of their job and position as they leave. Evaluate the events that went well and the activities that could have been improved on. This can also be a legacy for them to leave advice for the next person in this position. It is recommended to keep each of the previous officers and committee chairs comments in the notebook as new people fill those roles.

### **7.B.1. More recruiting – Considering First Pledge Class**

You most likely have 6 to 15 members at this time. You should always be recruiting for new members. At this point the group has probably been together for one to four months already. You have most likely passed over a winter or summer break by now as well.

Now is the time to consider, would this be a good time to have a First Pledge Class? They will still be chartering members of the Fraternity. You may just treat them like a pledge class. This would be somewhat of a repeat of the informational meetings that we had in the 4.I. Section. Time for an all out blitz to recruit members again, instead of one at a time.

To do this, you will need to elect a Pledge Trainer(s). Sometimes it is helpful to have both a male and a female pledge trainer in case a student feels uncomfortable about approaching one of them. Most people tend to gravitate towards the person that is most like them.

You should be electing this person a couple of months before the school term of school lets out and before the new one is to start. This will give them time to seek out information on how other Chapters run a pledge program. You will need to determine: service and fellowship project requirements, dues, attendance expectations, grievance methods, fraternity and campus history and trivia to teach them and what type of organizational structure the pledge class is going to have. This will basically be a smaller version of your group.

Most Chapters have what they call pledge parents or big brothers and big sisters assigned to the new pledges to help them through their requirements and another person that they can ask questions and for help from. The pledges can have two parents, a big brother and a big sister; whatever you want to do, just have fun with it.

### **7.C. Balanced Service Program**

You will most likely do many more than the 12 required service projects. As you complete your service projects, they should be fairly well balanced in the 4 areas of service to the College, Fraternity, Community and Nation. Four of these projects will need to have at least half of the groups attendance and another three require at least 25 percent of the groups attendance. Six of the projects will need to be fully initiated and planned by the group.

It is good to have a project that is a continuous support to the College or the community. You will however; need to have a variety of different types of projects that show some challenge and effort involved in organizing the events. Try a couple of projects that are intended to get the campus and community involved.

## **7.D. Fund-raising**

ARGH – The dreaded fund-raising!!!

Undoubtedly, you as the Sponsor will provide some out of pocket expenses to the Petitioning Group. Thank you very much for all that you do for them.

Lets first deal with fund-raising that we want to go directly to the Chapter. The group will need to start considering ways to raise money for their organization to keep their fees down, planning a large event or possibly help to offset costs to attend Fraternity events outside of their school.

There are several different ways that the group can raise funds. One of these is the: “BANC” Build a New Chapter” Grant Program made available for petitioning through Alpha Phi Omega and is in the Guidebook. This grant program is intended to support efforts to charter and recharter Chapters.

You should also seek out your campus organizations like your student government to see if they have resources and funding available for the activity that you want to present or attend.

If you have a local or Chapter alumni association, they may be able to help funding certain activities, events or conference attendance.

Then, there are the: car wash, bake sales, stadium cleanups, staffing for campus wide events and sales for a third party, that you provide the personnel and a way for them to come on campus.

The second type of fund-raising to consider is for a charitable organization. These tend to be easier to pull off, because you can usually get the campus and community involved in the spirit of good will towards another person or group.

These can include Dance-A-Thons for Muscular Dystrophy, Ugly Man on Campus, Daffodil Sales for the American Cancer Society, etc.

## **7.E. Attending Sectionals, Regionals, Nationals and other Chapter events**

It is a requirement of the group to have at least three members to attend at least one of the Sectional, Regional or National Fraternity events prior to chartering. This is hardly a difficult requirement; yet, a very important one. If we can get the Petitioning Group members actively attending other Chapter as well as Section/Region/National events; we will be very ahead of the game in encouraging this group to charter and keeping this future Chapter active after charter.

This is where the student really learn the brotherhood of the Fraternity. They will have a great time at the event and also learn from other Chapters about how they deal with situations they are having. They will have the opportunity to share and learn from others about their successful Service, Fellowship and Leadership programs. If you as the Sponsor and the president are excited about these events, the rest of the group is bound to be encouraged to go as well.

## **7.F. CPPC – Chapter Program Planning Conference**

The CPPC is an excellent vehicle to help the Chapter evaluate their progress and to set goals for the future. The initial time that the Petitioning Group completes this they will not be able to evaluate their past goals, but what they can do is to evaluate what they have done. Their new goals that they create should be their guide for the new officers and committees for the following terms.

An appropriate time to do this is typically towards the end of the charter process as they are preparing for an end of the semester or quarter before a break. It seems to be helpful to have this after elections for new officers too. Please be certain to have a very high percentage of members at this event as you set the direction for the Chapter for the next term.

It is recommended, but not required, that you accomplish the CPPC at the end of the Fall and Spring terms. This keeps a closer focus on goals and allows the group to revise them if necessary.

## **7.G. Bridging the Semester/Quarter and Summer breaks**

These breaks are true tests of the staying power for the Petitioning Groups. You will often times lose members because: they do not return to school the following school term, they have tougher classes, conflicting schedules, additional outside responsibilities with their family and work.

You should have the group set a goal for their membership size after the break. You should have the first meeting date, place and time already planned for when they return in the next school term before they leave. Someone should be responsible for retention of the current membership when they return.

Your recruiting and rush plans should be very well planned before the break is over as well, so that you can hit the ground running in your recruiting efforts the first couple of weeks back on campus.

You may have students staying on and around campus during these breaks. Encourage those remaining in the area to get together for fellowship events and to continue their service program as well.

## **8. AFTERCARE**

### **8.A. AFTERCARE PROCESS: (Restated from Section 3.C)**

(Time Period includes: The remaining time of the current semester/quarter that the chapter received their charter and the next two full Semesters/Quarters)

The following are objectives that a healthy new chapter should be able to accomplish in this time period:

1. Complete a successful pledge recruiting program of 6-10 weeks with a goal of 25% or more membership increase.
2. Enact a membership retention program to retain 75% or more of the charter members still enrolled on campus.
3. Accomplish new elections, with a goal of shared leadership and leadership development with new members.
4. Continuation of a comprehensive service and fellowship program.
5. Completion of a Chapter Program Planning Conference.
6. Continuation of activity with other chapters at intra-chapter/section/region/national events.
7. Completion of all requirements and reporting that are expected of Active Chapters.

The sponsor and Sectional Chair will share the responsibility in encouraging and supporting the new chapter in these objectives. The Sectional Chair and sponsor are expected to submit a collaborative, one page summary of the chapters progress, hi-lighting these objectives. This summary is to be submitted to the National Membership & Extension Program Director during the month of December or May as applicable, at the completion of each of the first two full semester/quarters after the chapter chartered.

This will mark the completion of the Aftercare Process. There is no approval method for this process, ability for any additional requirements to be levied, or status to be altered.

## Aftercare Process

### This time period includes:

The remaining time of the current semester/quarter that the chapter received their charter and the next two Full Semesters/Quarters.

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The Sectional Chair and sponsor are expected to submit a collaborative, one page summary of the chapters progress, highlighting these objectives.

This summary is to be submitted to the National Membership & Extension Program Director during the month of December or May as applicable, at the completion of each of the first two full semester/quarters after the chapter chartered.

### Congratulations on your charter!!



Here are some new objectives for your chapter to continue with your success.



This will mark the completion of the Aftercare Process. There is no approval method for this process, ability for any additional requirements to be levied, or status to be altered.

# AΦΩ

Leadership

Friendship

Service

Providing Service to:

Chapter

Campus

Community

Nation

Membership is open to all enrolled students.

Over 350 active chapters.

More than 300,000 students have joined AΦΩ since our founding on Dec 16th, 1925.

## Alpha Phi Omega National Service Fraternity

14901 E. 42nd Street  
Independence, Missouri 64055  
Phone: 816.373.8667  
Fax: 816.373.5975  
E-mail: [executive.director@apo.org](mailto:executive.director@apo.org)  
<http://www.apo.org>

## Alpha Phi Omega National Service Fraternity



## Chartering After-Care Guide

[www.apo.org](http://www.apo.org)

## **8.B. CPPC – Keeping a goal focus**

Fantastic!!!! You are now a CHAPTER!!!

This is just like finishing a spring semester of working hard at classes and cramming for the exams at the end. You just had your last exam before summer: ..... and Now What?

The group has worked so hard at the goal of charter, it seems like it has been their only focus, on that one goal. Now is the time to point the newly chartered Chapter back to their CPPC goals that they created as a petitioning group. Get them focused on these goals for the next term.

## **8.C. Sponsor/Section Chair transition**

Now that the Chapter has chartered, the Section Chair should begin to get more involved with the Chapter. Even though the Chapter has just Chartered, we still believe that it is important for the Sponsor to be involved in the Aftercare of the group. The Sponsor and the Section Chair will work with each other in the after care of the group as described in the section above.

## **8.D. Officer Transitions**

Though, not a requirement, it is helpful to have a transition of officers in the group after charter, including the president. You may consider encouraging this as leadership development of the Chapter. It does help to have the previous officer or committee chair around to ask questions about a position, instead of the same person holding that position until they graduate.

This helps to signify to the Chapter that they are not following one or two individuals and that they can perpetuate the Chapter for many years to come. As noted in 7.A.1., please have the officer and committee chairs write their evaluation of their jobs and advice to be placed in the officer or committee notebook for the next person to fill their shoes.

## **8.E. Pledge Classes**

Pledge classes are an interesting and new challenge for Chapters that were just chartered. The Pledge classes always seem to add new excitement and life to the group as we grow in membership. If the Chapter did not run through a pledge program while they were a petitioning group and this is their first time to have one, look back at section 7.B.1. More Recruiting – Considering First Pledge Class.

## **8.F. Keeping involved with Section/Region/National and other Chapters**

Another important After Care expectation for the Chapter is to stay involved in Section, Region and National events. Encourage their participation with other Chapters too. There are many opportunities to participate in Chapter Program Workshops (CPW), Leadership Development Workshops (LDW) and positions on section and region staffs for active members.

### **8.G. Keeping Advisors involved**

The Chapter will need to keep their advisors involved too. Each school term, the Chapter should be mutually agreeing with the Advisors on their expectations and roles for that term.

### **8.H. Jeopardy Time – signs to watch for the potential of losing a Chapter**

The last thing we want to have happen is to lose a Chapter soon after we chartered them. There is a fairly large potential for this. The jeopardy time that you should pay close attention to is within one to three years of charter.

Here is a list of signs to be on the look out for:

- All of the charter members have now graduated
- Most of the officers are graduating
- You have a large percentage of upper classmen
- The Chapter has skipped or had a poor recruiting term
- The Chapter is not reporting pledges to the national fraternity
- The Chapter is not represented at Section, Region or National events
- The Active Annual Membership Dues were not submitted
- Advisors are not attending Chapter meetings
- The Chapter has not had a meeting within two weeks of the new school term