



# Alpha Zeta Delta Alumni Corporation Master Plan 2000



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## **Mission & Vision**

### ***Chi Psi Mission***

Chi Psi is a private fraternity of gentlemen devoted to the personal and collective needs of its members. A selective association of Diverse individuals, Chi Psi is dedicated to the cultivation of a unique environment which instills a lifelong commitment to Brotherhood.

The mission of Chi Psi Fraternity is to create and maintain an enduring society which stimulates intellectual, ethical and social growth and encourages the sharing of traditions and values. In this pursuit, Chi Psi will encourage leadership, respect for oneself and others, and responsibility to the university and community.

### ***Chi Psi Values***

Chi Psi is defined by the values which are collectively accepted by its members. The extent to which values are practiced is the measure of our Fraternity.

- Chi Psi is a unique brotherhood which forges among individuals a lasting bond which transcends self-interest and the limitations of time or place.
- Chi Psi is committed to the growth of the individual in a social environment which nurtures integrity, dignity, and maturity while enjoying shared experiences and collegial sociability.
- Chi Psi, recognizing that academic achievement is fundamental to the development of the individual, stands for the intellectual growth and the attainment of human potential.
- Chi Psi believes that the role of the Fraternity is to guide each Alpha in the responsible self government of its affairs within a common framework established by the Constitution and By-Laws of the Fraternity.
- Chi Psi acknowledges its responsibility to the larger community of which it is a part by encouraging personal and collective involvement in serving the needs of the University, the Community and Society.
- Chi Psi, while recognizing that change is inevitable and desirable, believes that tradition provides stability in a rapidly changing world and develops a sense of personal identity in an impersonal society.
- Chi Psi is committed to the elimination of any activity which demeans or threatens the individual, or compromises its traditional standards of gentlemanly behavior.

Chi Psi Fraternity stands as proof that commitment of mutual assistance and these shared values, given in youth, does not falter nor diminish with age.

### ***Alumni Corporation Mission***

The mission of the Corporation of Alpha Zeta Delta of Chi Psi is to provide guidance, support, and continuity to Alpha Zeta Delta of Chi Psi.

### ***Role of the Alumni Corporation***

1. Provide For the Needs of the Lodge
2. Develop A Strategic Long-Term Plan
3. Minimize Exposure to Potential Liability Risks
4. Provide Continuity to the Alpha
5. Actively Recruit New Board Members
6. Provide Good Role Models for the Alpha Undergraduates

### ***Responsibilities of the Alumni Corporation***

1. Own, Operate, and Maintain the Lodge
2. Maintain Complete Financial Records
3. Maintain Status as a Legally-Recognized Not-For-Profit Corporation with the State of Illinois
4. Ensure Adherence to Chi Psi Risk Management Policies
5. Obtain and Pay for Property and Liability Insurance
6. Maintain a Proactive Relationship with the Undergraduate Alpha

### ***Alumni Corporation Vision for Alpha Zeta Delta***

*May 25, 2012:* As Alpha Zeta Delta celebrates 100 years of existence at the University of Illinois, Chi Psi is one of the strongest, most respected fraternities on the University of Illinois campus and is a perennial finalist for the Thayer Trophy as a model Alpha of Chi Psi. Average membership is 60 gentlemen, yet the Alpha boasts a surprisingly close-knit brotherhood. The Lodge, owned by the alumni, is continuously at its capacity, with all members living in the Lodge for at least two years beginning with their sophomore years. Pledge class size is typically 12-15 in the fall semester and 5-8 in the spring semester. The Buell Scholarship continues to be a primary source of recruits, providing 10-15 high-quality pledges annually, but focused recruiting of friends and acquaintances is another important source of new members. Chi Psi only extends bids to the highest-quality candidates, and bids are nearly always accepted. Chi Psi consistently ranks in the top 5 among the 50 fraternities at Illinois scholastically and is a perennial finalist for the Goodbody Trophy. The Parent's Club is a very enthusiastic organization that plays an active role in supporting the Alpha, while alumni events often draw 50 or more alumni spanning several generations. The Alpha's annual philanthropy event has become a highly anticipated campus tradition that raises over \$15,000 per year for charity. Chi Psi social events are legendary for showing that substance-free doesn't mean fun-free; in fact, the top sororities on campus always have room on their calendars for a mixer or exchange with Chi Psi. Scholarships and grants from the Alpha Zeta Delta of Chi Psi Educational Foundation are the envy of the fraternity world. One or more Chi Psis typically sit as officers on the Illinois Student Government and Inter-fraternity Council, and Chi Psis are active in a wide variety of student organizations. Most importantly, though, Alpha Zeta Delta of Chi Psi is a fraternity of gentlemen and a fraternity of life-long friends.

# Strategic Long-Term Plan

## ***Long Range Objectives***

1. Own and operate a Lodge that is maintained in good condition
2. Reach a sustained membership of 60 actives.
3. Improve the training, development and continuation of leadership among alumni.
4. Develop a relationship between the actives and alumni
5. Encourage social responsibility and combat the abuse of alcohol and other drugs.

## ***Strategies and Tactics***

Objective: Own and operate a Lodge that is maintained in good condition.

Strategy:

1. Begin fundraising early
2. Develop and implement a plan for acquiring the Alpha Chi Rho house
3. Enlist third-parties to assist with identifying special opportunities to purchase a suitable property other than the Alpha Chi Rho house
4. Identify and explore opportunities to fund the cost of buying, renovating, and maintaining a Lodge.
5. Develop and implement a plan to ensure that the Lodge remains full.
6. Investigate the possibility of buying and converting a suitably-located apartment building.

Tactics:

1. Strategy: Begin fundraising early
  - 1.1. Complete the master plan
  - 1.2. Hire a professional with a good track record
  - 1.3. Consult with other Alphas about fundraising experiences & recommendations
  - 1.4. Communicate the master plan to alumni to create a shared vision and generate enthusiasm even before there are finalized arrangements for buying a Lodge
  - 1.5. Communicate annual fundraising targets, cumulative fundraising target, and progress toward reaching each goal
2. Strategy: Develop and implement a plan for acquiring the Alpha Chi Rho house
  - 2.1. Leverage cost-sharing for expensive investments in the property (fire codes, computer network tie-in, etc.) as means to secure a longer-term lease with option to buy
  - 2.2. Be sensitive to the emotional ties that the AXP corporation has to their building
  - 2.3. Be prepared to switch from a direct purchase option to an easier-to-swallow lease-to-own option if the AXP corporation is resistant to selling the property outright because of slim hopes of colonizing at some point in the future.
3. Strategy: Enlist third-parties to assist with identifying special opportunities to purchase a suitable property other than the Alpha Chi Rho house
  - 3.1. Identify and document specific search criteria, including cost, location, size, and type of facility that would be suitable for a Lodge.
  - 3.2. Work with the Greek Affairs Office to stay at the top of the list for receiving notice of available properties
  - 3.3. Enlist a real-estate agent to watch the market for listings
4. Strategy: Identify and explore opportunities to fund the cost of buying, renovating, and maintaining a Lodge.
  - 4.1. Set aside majority of corporation savings as seed for a Lodge Fund
  - 4.2. Plan and implement a fundraising campaign to grow the Lodge Fund
  - 4.3. Determine the size of mortgage that can be supported by rental income from the Lodge.
    - 4.3.1. Examine different types of mortgages and consider best-case & worst-case scenarios arising from each type.
    - 4.3.2. Consider impact of interest rate fluctuations

- 4.4. Evaluate options for possibly investing in converting existing living space to increase the capacity of the Lodge and increase potential rental revenue.
- 4.5. Alpha Building Fund
- 4.6. Identify opportunities for the AZA Foundation to fund renovations and maintenance
  - 4.6.1. Library
  - 4.6.2. Study carrels
  - 4.6.3. Computer lab
  - 4.6.4. Computer network
- 4.7. Identify alumni that can volunteer to donate to provide low-cost materials and/or labor to perform renovations and maintenance.
- 4.8. Make arrangements with AZA Foundation for short-notice action if an ideal opportunity for purchasing a Lodge presents itself.
5. Strategy: Develop and implement a plan to ensure that the Lodge remains full.
  - 5.1. Increase the percentage of actives living in the lodge
  - 5.2. Increase the overall membership of the Alpha
  - 5.3. Consider the appropriate size for the Alpha in choice of a Lodge to purchase and occupy
6. Strategy: Investigate the possibility of buying and converting a suitably located apartment building.
  - 6.1. Investigate market prices
  - 6.2. Approach an apartment management company about the prospect of a cooperative arrangement
  - 6.3. Investigate city zoning regulations

**Objective: Reach a sustained membership of 60 actives.**

Strategy:

1. Increase number of new members
2. Increase retention of existing members

Tactics:

1. Strategy: Increase number of new members
  - 1.1. Be a top Alpha in Chi Psi and a top fraternity at Illinois—success is the greatest magnet for recruits
    - 1.1.1. “Dignify The Fraternity” (Albert S. Bard)
    - 1.1.2. “In All Things, Excellence” (Oliver R. Rowe)
    - 1.1.3. “Don’t just talk about it—DO IT!” (Robert B. Plunkett)
  - 1.2. Utilize Buell Scholarship
    - 1.2.1. Actives act as interviewers to build relationships with and earn respect of candidates
    - 1.2.2. Alumni act as greeters at interviews to build relationships with and sell Chi Psi to parents
    - 1.2.3. Use recognition events such as barbecues for finalists as rush events – candidates that share Chi Psi ideals should be prejudiced toward Chi Psi before other fraternities have a chance to recruit them.
    - 1.2.4. Increase the target market of the Buell Scholarship to include the entire state of Illinois
    - 1.2.5. Direct Buell applicants to the Alpha Zeta Delta web-site as an opportunity to expose them to Chi Psi, and maintain the web-site as an effective showcase for the Alpha
  - 1.3. Recruit friends and acquaintances
    - 1.3.1. Pledges and new-initiates live in dorms entire freshman year as a means to maintain contact with potential rushees
    - 1.3.2. Actives study and hang-out with pledges and new-I’s in their dorm so they build friendships with roommates and other men on the floor
  - 1.4. Pledges must take an active part in recruiting for their own pledge class
    - 1.4.1. Recruit 2-3 members into each new pledge class in the latter half of the previous semester to provide leadership in the pledge class and give those pledges time to get started in building their own class
    - 1.4.2. Remind pledges that their pledge class will be stronger and their experience will be more fulfilling if they bring their own friends into Chi Psi with them
  - 1.5. Help the actives and pledges to develop skills in the art of rushing
    - 1.5.1. Conduct annual or semi-annual rush workshops led by alumni

- 1.5.2. Experienced, successful rushers pass their art along to new members
- 1.6. Target a pledge class size of 15 each fall and 10 each spring.
  - 1.6.1. Develop and implement a recruitment plan each year that applies the lessons of previous rush campaigns.
  - 1.6.2. For each source of rushees, determine the percentage of men rushed that typically receive bids and the number of bids that are typically received. Rush sufficient numbers of men from each source to ensure that the targets can be reached given the inevitable attrition in the rush process.
  - 1.6.3. Annually re-examine the return on investment from different sources of rushees and make adjustments if necessary.
  - 1.6.4. Annually seek to identify new sources of rushees and develop strategies to capitalize on promising new sources.
- 2. Strategy: Increase retention of existing members
  - 2.1. Reduce active "burn-out" so critical senior leadership is not lost
    - 2.1.1. Set a limit on the number of offices a member may hold at one time
    - 2.1.2. Committees should have at least two members in addition to the chairman
    - 2.1.3. Share work evenly among members
    - 2.1.4. Enhance social programs without compromising responsible behavior
    - 2.1.5. Enhance intramural athletic involvement without sacrificing scholastic standing
  - 2.2. Improve scholarship of the Alpha so that members stay enrolled until graduation
    - 2.2.1. Consider academic commitment with other factors in evaluating rushees
    - 2.2.2. Implement minimum GPA requirements for new members
    - 2.2.3. Continue to use scholarships as incentive
    - 2.2.4. Provide public recognition of academic achievement
    - 2.2.5. Develop an environment of consistent positive peer pressure toward scholastic excellence
    - 2.2.6. Reduce the culture of alcohol-centric social life while building morale through social programs that are both fun and responsible

**Objective: Improve the training, development and continuation of leadership among alumni.**

Strategy:

- 1. Assemble and maintain a network of alumni with a desire and/or potential to assist the Alpha
- 2. Involve alumni that are not on the corporation or foundation boards to assist with committees and special assignments
- 3. Seek out alumni to ensure the desired makeup of the corporation and foundation boards is maintained
- 4. Encourage alumni to become active NLTP facilitators

Tactics:

- 1. Strategy: Assemble and maintain a network of alumni with a desire and/or potential to assist the Alpha
  - 1.1. Keep new alumni involved after graduation
  - 1.2. Enlist the help of a key alumnus for each generation to stay in contact with his contemporaries
    - 1.2.1. Revive the use of the #27 (corresponding secretary of the senior class)
  - 1.3. Provide special updates to the "involved" alumni (similar to the "official family" at the national level)
  - 1.4. Recruit repeat-attendees at alumni social events to become involved in other ways
  - 1.5. Recruit repeat-donators to become involved in other ways
- 2. Strategy: Involve alumni that are not on the corporation or foundation boards to assist with committees and special assignments
  - 2.1. Include at least one non-board member on each standing committee
  - 2.2. Recruit an apprentice for highly skilled positions such as treasurer or Buell Scholarship director
  - 2.3. Local alumni can help as alumni advisor, representative at University-sponsored meetings in Champaign, etc.
  - 2.4. Invite non-board alumni to special-purpose meetings in the Chicago-area to discuss big issues of broad appeal (like buying a Lodge)

- 2.5. Enlist the help of alumni interested in organizing an alumni social event
3. Strategy: Seek out alumni to ensure the desired makeup of the corporation and foundation boards is maintained
  - 3.1. Determine and periodically re-evaluate the skill mix needed within each board
  - 3.2. Determine the appropriate class-year mix within each board
  - 3.3. Identify deficiencies on the current boards and focus short-term recruitment on addressing those deficiencies
  - 3.4. Look first to non-board members of committees as candidates to replace out-going committee chairmen
  - 3.5. Continually evaluate the mix of skills and generations within the network of “involved” alumni, and seek out alumni to address gaps in the mix
4. Encourage alumni to become active NLTP facilitators

## Objective: Develop a relationship between the actives and alumni

### Strategy:

1. Provide timely and energizing communication about events
2. Thoroughly organize events
3. Provide alumni reason to attend events
4. Encourage involved alumni to maintain a personal network of Chi Psi friends

### Tactics:

1. Strategy: Provide timely and energizing communication about events
  - 1.1. Communicate a social calendar extending one year into the future in each issue of the Parthenon
  - 1.2. Communicate a social calendar extending one year into the future on the Alpha Zeta Delta web-site
  - 1.3. Direct alumni to the Alpha Zeta Delta web-site in each communication
  - 1.4. Encourage alumni to subscribe to the AZDalumni@egroups.com e-mail list for regular updates on Alpha news and upcoming events
  - 1.5. Include one event-specific mailing to alumni within driving distance of any event
  - 1.6. Organize a marketable event and then market the event in every forum (don’t just announce it—sell it)
2. Strategy: Thoroughly organize events
  - 2.1. Begin planning events one year in advance
  - 2.2. Provide an event date to the webmaster and Parthenon editor 10-12 months before the event
  - 2.3. Provide an event time, location, and RSVP information to the webmaster and Parthenon editor 3-6 months before the event
  - 2.4. Organizing an event means more than choosing a date and location—focus on the details
  - 2.5. Utilize a committee with distributed responsibilities (the chairman should coordinate not do all the work himself)
3. Strategy: Provide alumni reason to attend events
  - 3.1. Many alumni have wives or girlfriends—make them feel welcome
  - 3.2. Many alumni have children—make them feel welcome
  - 3.3. Alumni have lives outside of Chi Psi—make it possible for them to attend by considering date, time, location, and commute time in scheduling an event
  - 3.4. Tie in to football games or other University events that draw alumni to campus
  - 3.5. Include engaging social activities with pizzazz—don’t just invite alumni to visit the lodge and stand around talking and eating
  - 3.6. Minimize the scope and duration of alumni meetings that interfere with social activities
  - 3.7. More alumni live in Chicagoland than around Champaign—have at least 50% of alumni events where the alumni live
  - 3.8. Be a top Alpha in Chi Psi and a top fraternity at Illinois—success is the greatest magnet for alumni
    - 3.8.1. “Dignify The Fraternity” (Albert S. Bard)
    - 3.8.2. “In All Things, Excellence” (Oliver R. Rowe)
    - 3.8.3. “Don’t just talk about it—DO IT!” (Robert B. Plunkett)

- 3.9. Encourage involved alumni to maintain a personal network of Chi Psi friends

**Objective: Encourage social responsibility and combat the abuse of alcohol and other drugs.**

**Strategy:**

1. Educate members and prospective members on the importance of social responsibility and the dangers of drug and alcohol abuse.
2. Ensure adherence to local and national risk management policies.

**Tactics:**

1. Strategy: Educate members and prospective members on the importance of social responsibility and the dangers of drug and alcohol abuse.
  - 1.1. Require the Alpha to undergo a Risk Management Retreat during every Alpha Visit from the #20.
  - 1.2. Require that the Speaker Series include at least one presentation annually from a qualified speaker on the medical and social impacts of alcohol and illegal drugs. All actives and pledges must attend unless granted a special exception by the Risk Management chairman for the Alumni Corporation.
  - 1.3. Pledges must attend the drug & alcohol presentation to initiate.
  - 1.4. Pledge Dance should be an alcohol-free event, as a way to teach hands-on experience in planning fun alcohol-free events.
2. Strategy: Ensure adherence to local and national risk management policies.
  - 2.1. Require the Alpha to undergo a Risk Management Retreat during every Alpha Visit from the #20.
  - 2.2. Perform quarterly reviews of the risk management worksheets required by local risk management policy.
  - 2.3. Besides Pledge Dance, host at least one additional alcohol-free event each year.
  - 2.4. Review the local and national risk management policies annually.
  - 2.5. Perform an annual review of the impact of substance-free housing on campus, and facilitate an annual discussion between undergraduates and alumni on the subject.