Alumnae Development Consultant (ADC) Transition Form:

Group from ADC to region

ADC to complete this form when they turn a group back over to the regional team.

# https://docs.google.com/drawings/u/1/d/sETnxIqxMSOOxFAHW1ukABA/image?w=320&h=140&rev=1&ac=1Submit form via email to:

Council Trustee: Alumnae

Director: Alumnae Development

Director: Alumnae Resources

Director: Lifetime Engagement

Regional Director

Region’s Alumnae Specialists

Alumnae Development Specialist

## GROUP STATUS

The criteria outlined below are the key indicators that an alumnae group is functioning according to the Fraternity Standards for Alumnae Groups. By checking the box, ADC is indicating that the group meets this standard. For any criteria not met, the ADC must provide comments as to the status of task.

# Group demonstrates an understanding of and respect for Delta Gamma’s larger purpose and values.

* Group members honor and align their behaviors with Fraternity values, policies and procedures.
* Group officers incorporate Delta Gamma’s purpose and values into group operations and programming.
* Group members are aware and respectful of their role within the larger Fraternity.
* Group members honor and respect Fraternity visitors.
* Group members understand and honor their Membership Responsibilities as stated in their Statement of Obligation.
* Group members know and uphold the Oath of Friendship, and honor the Oath of Secrecy.
* Group officers integrate ritual into alumnae meetings and events respectfully.
* Group members participate in ongoing informal rituals.
* Group officers collaborate with chapter officers from the collegiate chapter(s) the group supports to assist with Inspiration, Initiation and the Initiation Celebration in accordance with the policies and procedures outlined in the Rituals Handbook and Initiation Ceremony, if applicable.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group champions authentic sisterhood that challenges women to become better versions of themselves.**
* Group officers promote a “Culture of Care”.
* Group members care for and respect each other.
* Group members confront each other’s concerning behaviors from a place of care.
* Group members understand that authentic sisterhood means holding each other accountable to the standards of Delta Gamma.
* Group members honor and respect each other’s differences.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Executes timely reporting and effective communication regarding all alumnae group business and activities.**
* Group officers are prompt and thorough when communicating with their Regional Alumnae Specialist (RAS) or Alumnae Development Consultant (ADC) and relevant Executive Offices (EO) staff or Fraternity volunteers.
* Group officers communicate with their membership regularly through multiple forms of communication.
* Group is using correct terminology.
* Group officers provide written updates to the Fraternity magazine, *ANCHORA*, by the spring and fall issue deadlines.
* Group officers distribute a newsletter to all alumnae in their area with a dues request at least once annually.
* Group history/documents are organized, current and easily accessible.
* Group’s social media accounts adhere to the Social Media Policy and are used appropriately.
* Group’s website is current.
* Group officers keep minutes of all board meetings and uploads them in e-Ops+.
* Group tasks and Fact Sheet in e-Ops+ are current.
* Group officer roster in e-Ops+ is current.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group fosters positive and collaborative relationships with the larger Fraternity, local community, local alumnae and their supporting collegiate chapters.**
	+ - * Group collaborates with the collegiate chapter(s) they support (if applicable), local alumnae, local community, and the larger Fraternity to solve problems, as needed.
			* Group has a strong presence and image reflects Delta Gamma’s values within the community.
			* Group is encouraged to have representation on the local Alumnae Panhellenic Association, if applicable.
			* Group officers have a positive working relationship with the collegiate chapter(s) they support (if applicable), their house corporation(s), and their advisory team(s).
			* Alumnae group president is aware of her role as an ex-officio voting member on local house corporations for the collegiate chapter(s) they support (if applicable).
			* Group officers are familiar with collegiate recruitment sponsorship responsibilities and alumnae group president appoints a City Sponsorship Chairmen.
			* Group officers encourage member participation in events planned by the collegiate chapters in their area, when invited.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group welcomes all members into alumnae groups by utilizing thoughtful recruitment and retention efforts.**
	+ - * Group follows the Fraternity Positional Statement on Inclusivity when making membership related decisions.
			* Group welcomes all alumnae in their geographic area, regardless of their undergraduate chapter or year of initiation.  Any alumnae member in good standing shall be eligible for membership in any alumnae chapter or association.
			* Groups are required to have 20 or more members to qualify as an alumnae chapter or 10-19 members to qualify as an alumnae association.
			* Group members actively recruit new alumnae to join the group and attend programming events.
			* Group follows all voting-related policies and procedures pertaining to the Alumnae Initiate program.
			* Group officers retain their alumnae members by evaluating past programs, encouraging and implementing new ideas, and generating enthusiasm.
			* Group officers retain their alumnae members by creating Special Interest Groups (SIGs) and/or generational groups to maintain member interest.
			* Group officers retain members by celebrating individual alumnae membership milestones, such as 25, 50, 60, 70, and 75 years of membership.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group encourages members to achieve their potential through participation in leadership and personal development opportunities.**
	+ - * Group members are encouraged to seek leadership roles within the larger Fraternity, their local community, and their alumnae group.
			* Group members are aware of and group officers promote participation in leadership and personal development programming, such as Hope Serving, Leveraging Leaders, and the PRO program.
			* Alumnae chapter presidents attend Delta Gamma Convention and all required Convention General Sessions as their chapter’s voting delegate.
			* Required alumnae group officers attend Delta Gamma’s April Institute, if applicable.
			* Required alumnae group officers attend their assigned Regional Training Day, if applicable.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group Celebrates the accomplishments and milestones of the Fraternity, their alumnae group, and individual group members.**
	+ - * Group officers submit Fraternity Award Applications to be recognized for their achievements in during Convention years.
			* Group members are aware of and group officers nominate individual alumnae to be recognized for their achievements in leadership and service via individual alumnae awards.
			* Group members are aware of and group officers select individual alumnae to be recognized within their alumnae group by utilizing local awards.
			* Group officers collaborate with chapter officers from the collegiate chapter(s) the group supports to assist with Senior Installation/Recommitment Ceremony, if applicable.
			* Group works with other local alumnae groups (if applicable) and supporting collegiate chapters to host a Founders Day celebration each year on or around March 15.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group supports the Delta Gamma Foundation and engaging in service to others in the spirit of doing good.**
* Group promotes service opportunities and supports the Foundation both locally and nationally.
* Group officers are aware of and promote the three signature programs of the Foundation: Service for Sight, Individual Grants to Members, and the Leadership and Educational Grants to the Fraternity.
* Group holds fundraising events for the Foundation annually.
* Group holds at least one Service for Sight focused service event annually.
* Group holds at least one Foundation Awareness event annually.
* Group officers are aware of the Chapter Giving Program, understand the process to submit fundraising profits to the Foundation, and do so in a timely manner.
* Group officers track all Foundation-related activity in e-Ops+.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group honors all fiscal-related responsibilities to be in financial good standing.**
	+ - * Group operates utilizing the fiscal year: July 1 - June 30
			* Group maintains a bank account locally.
			* Group officers prepare an annual budget to fund alumnae group operations.
			* Group officers complete annual IRS tax filing, as instructed by Executive Offices.
			* Group officers will transfer all group assets to Delta Gamma Fraternity upon group disbandment, if applicable.
			* Group officers pay all applicable fees and invoices by their due dates.
			* Group officers must pay per capita and local dues to remain in office.
			* Group officers actively encourage and publicize opportunities for their members to pay both local dues and per capita dues.
			* Group members pay per capita dues annually until they reach 50 years of membership, at which point they may continue to participate in Fraternity affairs without per capita dues payment.
			* Group officers record local dues payments in e-Ops+.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group performs all necessary operations to have a successfully functioning group.**
	+ - * Group officers understand the criteria to remain an alumnae group in good standing and actively pursues that goal.
			* Group officers set yearly goals for their group.
			* Group officers utilize the most recent versions of all applicable handbooks, policies, and resources available in the Delta Gamma website library.
			* Group officer meetings are occurring at an appropriate frequency.
			* Group officer meetings are organized, efficient and productive.
			* Group officers utilize Roberts Rules of Order in all board and group meetings.
			* Group business is decided via vote utilizing the quorum number defined in their bylaws.
			* Group officers appoint Bylaws Review Committee (BRC).
			* Bylaws Review Committee (BRC) reviews and updates their group’s bylaws each year per the model bylaws and proposes potential amendments, if needed.
			* Group votes on the proposed bylaws and submits to RAS for final approval.
			* Group names are designated by the name of the city or area in which it is located.
			* Group officers should conduct a zip code analysis annually to determine which zip codes to add or delete from the membership roster.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group fulfills all required programming expectations in a thoughtful and intentional way.**
	+ - * Groups that are alumnae chapters hold at least 6 events per year.
			* Groups that are alumnae associations hold at least 3 events per year.
			* Group officers plan events utilizing the Five Star Programming Model with events focused in each of the programming areas: sisterhood, membership, community, Foundation, and networking.
			* Group officers shall make every reasonable attempt to attend the events hosted by the alumnae group.
			* Group officers plan unique programs that are inclusive of all generations.
			* Group officers actively seek feedback from members on programming satisfaction.
			* Group officers have added all alumnae group events to their group’s e-Ops+ calendar.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Group conducts officer elections, officer responsibilities, and transitioning to cultivate ongoing leadership within the alumnae group.**
	+ - * Groups that are alumnae chapters must have a president, vp: finance, vp: membership, vp: programming, and vp: communications.
			* Groups that are alumnae associations must have a president, vp: finance, and vp: communications.
			* Group officers fulfill their duties as outlined in their individual officer position descriptions in the Alumnae Officers Manual.
			* Group president is elected on odd years only.
			* Group officer positions are elected for two-year terms.
			* Group officer vacancies that occur mid-term shall be filled immediately by appointment.
			* Group president appoints Nominating Committee annually.
			* Nominating Committee creates and presents officer slate to the group for a vote. Voting must be by ballot unless there is only one candidate per position.
			* Group officers thoroughly transition all incoming officers prior to officer installation.
			* Group officers utilize succession planning and survey members for potential officer interest.

## SUMMARY OF ADC ASSIGNMENT

*Please comment below and include important contact information, key points of your communication, strengths/weaknesses of group, and historical information during your time working with group.*

## ADC RECOMMENDATIONS FOR RAS/REGIONAL TEAM:

*Please comment below and include any suggested next steps with group and potential areas for growth.*

## ADC TRANSITION CHECKLIST:

*The ADC must complete these elements as part of the transition process*

* Recommendation for transition back to region made to RD, Region’s Alumnae Specialists and Director: Alumnae Development
* Transition back to region approved (approval by Director: Alumnae Development and RD)
* Inform the following individuals of transition approval:
	+ Trustee: Alumnae
	+ Director: Lifetime Engagement
	+ Director: Alumnae Resources
	+ Alumnae Development Specialist
	+ RD and RAS’s
	+ Local group officers as appropriate (be sure to include RAS in this process to ensure that the information is presented in the most positive manner)
* Determine the RAS who will work with group
* Determine transition timeline and date when transition will take place
* Conduct transition with RAS
	+ Provide all necessary documents to RAS
	+ Hold a turnover call with RAS (and RD if applicable)
	+ Introduce RAS to key group contacts/officers
	+ Submit ADC Transition Form (see top of form for submission instructions)

ADC’s are expected to be available to RAS and regional team during the transition process to provide support, answer questions, and ensure a successful transition.