



Revitalization, Merger, Disbandment, Name Change & Status Change Processes for Alumnae Groups

REVITALIZATION

What is Revitalization?

Revitalization is a way for Regional Alumnae Specialist (RAS)/Alumnae Development Consultant (ADC) and local alumnae to work together to give a fresh start to a group who may have struggled with membership, operations, programming or has not met the Fraternity Standards for alumnae groups for a minimum of two years (poor standing).

What does it mean for a group to be in poor standing?

If a group has not met at least 60% of the Fraternity Standards in any given year, they are considered in poor standing. In addition, if a group has not done any or all of the following, they are considered to be needing additional support from the RAS, Regional Director (RD), and/or ADC:

- Lack of required number of officers.
- Failure to pay Fraternity/Fraternity Housing Corporation (FHC) dues and fees.
- Failure to file taxes with the Internal Revenue Service (IRS).
- Fewer than required members paying per capita dues in a fiscal year.
- Fewer than required numbers of events in a fiscal year.

STEPS TO RAS/ADC LED REVITALIZATION

If a group is determined to need a full revitalization, please perform the following steps:

- Perform a [Zip Code Analysis](#) of current membership area to determine if all zip codes are appropriate or if any surrounding areas should be included.
- Send out a survey to all members in the area. Surveys can be done through many platforms, including Google Forms or Member Planet. Paper surveys are at the discretion of the RAS depending on number of members without email addresses and available funds in local group treasury.
 - Survey should include:
 - Questions related to types of programming members would like to see.
 - Specific ask for officers and options to list positions interested in.
 - Days of week and times of day for programming.
 - Demographic information such as name, contact information, year of initiation, chapter of initiation.
 - Questions to why they have not participated in the past.
 - How would members like to be engaged with the local alumnae group.

- Allow three to four weeks for members to respond to survey. If survey results are favorable (at least eight to ten women interested in participating in a group and women interested in leadership roles), proceed to Steps to Revitalization section below. If responses are not favorable for revitalization (majority of no responses or very minimal response), proceed to the Predisbandment section.

If eight to ten women have not expressed interest, but there is sufficient favorable response, an ADC appointment can be considered for this group.

STEPS TO REVITALIZATION

- Once survey results have been received, review survey results to determine the women that are interested in being an officer. Reach out to those women directly and explain the position, time commitment and why they are interested in the role.
- Once you have spoken to all interested women, formulate the slate of incoming officers and let them know of their appointment, including appropriate term limits.
- Schedule an interest session with local women to generate interest in group and begin planning upcoming calendar of events.
- RAS/ADC to schedule Training Day in the local area. Interest session and training day can be combined in the same weekend, if scheduling permits.
 - Training Day should include a minimum of the following:
 - Icebreakers/Team Building Activities
 - Nuts and Bolts of Alumnae Groups
 - Fraternity Standards for Alumnae Groups
 - Review of Job Descriptions/Expectations
 - Five Star Programming Model
 - Technology
 - Budget/Finance
 - Bylaws
 - Working Session to discuss goals and next steps/action plans.
- Once training is complete, the RAS will continue monthly communication with the group to ensure that they continue to meet requirements. This would include paying any past due fees to the Fraternity or Fraternity Housing Corporation.

Note: If the group has not paid dues and fees for two or more years, they will also have to pay a \$80 alumnae group reinstatement fee.

If a group has attempted to revitalize and there is a lack of interest in leadership and/or having an alumnae group in the area, please refer to next pages on Merger Process vs. Disbandment Process

If a chapter/association has not paid the required dues and fees for two or more years and the group has successfully revitalized, the RAS/ADC may petition Council to forgive all debts for the group in accordance with the Fraternity Constitution, Article XV Section 2.B:

- When an alumnae chapter or alumnae association fails to meet its financial obligations to the Fraternity for a two (2)-year or greater period or fails to file all reports designated and fails to comply with ARTICLE XVIII, Council may forgive the said debt(s) in order for the chapter or association to reorganize as a probationary chapter or association provided.
 1. The chapter or association pays a reactivation fee and

2. The chapter or association meets all financial and filing obligations for a three (3)-year period after reorganization at which time the probationary status is lifted.
3. A probationary chapter that has met all reorganization financial and filing obligations shall be seated at Convention in accordance with ARTICLE VIII.

GROUP STATUS CHANGE

If a group is a chapter and struggles to fulfill their requirements as a chapter but feel they could easily take on the requirements of an association, they may opt to change their group status from a chapter to an association.

Steps to Change Your Group's Status

- Executive board sends a vote to all members of their alumnae group with the rationale for the status change.
- If vote passes, the alumnae group will complete the [Status or Name Change Request form](#) and submit it with the minutes documenting the vote to the Alumnae Development Specialist at ADS@deltagamma.org.

Once Council has approved your group's status change request:

- Update your alumnae group's name with your bank.
- Update your social media accounts.

Note: These steps also apply to associations who wish to become a chapter.

MERGER PROCESS

If a group has attempted a revitalization and has been unsuccessful in their attempts, a merger or possible disbandment should be considered for the group with approval from Director: Alumnae Development, Regional Director, and Council.

What is a Merger?

A merger is a unique opportunity for an alumnae group who has attempted revitalization and exhausted all possible resources available to sustain active membership. This is an option for groups who still wish to function socially but are not compliant with reporting and/or are no longer able to meet their financial obligation to the Fraternity. The proposed action would be to offer a merger with a larger, more highly functioning group over disbandment if geographically possible. Mergers can be considered by three different teams:

- Members of the group assess that they have done all they feel they can to attract new members and sustain the group (revitalization) but have 1 or more members that are committed to keeping the group connected.
- Regional Director and Regional Alumnae Specialists determine that the regional team has done all they can to help the group
- Council Trustee: Alumnae, Director: Alumnae Development, Director: Alumnae Resources, and Director: Lifetime Engagement conclude with the input from the regional team that the use of further resources such as an ADC assignment will not be productive

Steps to Merge Two Alumnae Groups

- RAS/ADC and/or Regional Director to review alumnae groups near merging group to determine if there is group in geographic proximity that can absorb additional members. The following factors should be considered:
 - Number of alumnae members in accepting group.
 - Current financial status of accepting group.
 - Fraternity standing of accepting group.
- RAS/ADC will initiate conversation between each group's presidents to discuss possible merger.
- If both presidents agree, they will put in writing their desire to merge the two alumnae groups.
- A vote should be taken of each alumnae group to determine member approval for merger. The vote can be done electronically in accordance with each group's bylaws and members should be given at least two weeks to respond.
- The RAS/ADC overseeing the group will compile all appropriate communication and voting results and send to the ADC, along with a letter in support of the merger.
- ADC will review packet for completeness and forward to Council Trustee Alumnae for review and Council vote.
- Once Council has voted to approve the merger:
 - Contact Alumnae Development Specialist regarding any past due financial obligations of the merging group.
 - The merging group is asked to be in good standing by making all past status financial obligations.
 - If this is not possible, please submit a written request to Council for exemption with an explanation of merger plans to avoid official disbandment.

- Close bank accounts and if money is present, move to accepting group's account with a request that these funds be earmarked for the merging group's programming and communication needs.
- Regional Alumnae Specialist to contact Alumnae Development Specialist, to make her aware of the merger and ask that she combine zip codes under the accepting group.
- Confirm that the chapter locator is accurate to direct people to home group
- Home group establishes a board position (SIG coordinator) for a representative from the merging group.
 - This representative may form a committee to help plan events for the area
- Home group should review bylaws to determine if any additional information is necessary to outline specific operating procedures with the merging group.
- This procedure is intended to enhance the Delta Gamma experience for all involved and is open to interpretation as to what works best in individual situations upon the review of the Alumnae Team.

What should I do if a merger isn't possible for my group?

If a revitalization has been attempted and was determined to be unsuccessful AND a merger could not be done be completed between two groups, the RAS/ADC should begin the Pre-Disbandment process.

PRE-DISBANDMENT/DISBANDMENT PROCESS

When should an Alumnae Group consider disbandment?

An alumnae group should consider disbandment in the following scenarios:

- Alumnae group has attempted revitalization with RAS/ADC in the past two years with insufficient response or interest AND
- Alumnae group is not able to merge with another nearby alumnae group

OR

- As set forth in Model Bylaws, Article XII, for Alumnae Chapters and Associations:
 - Section 1. If the chapter/association fails to meet its financial obligations to the Fraternity for a two-year period, or if it fails to maintain “good standing,” its charter/certification must be relinquished upon the request of Council.
 - Section 2. To voluntarily relinquish its charter/certification, the alumnae chapter/association must notify the RAS/ADC prior to any vote to relinquish its charter/certification. The alumnae chapter/association shall notify its members of a vote to relinquish its charter/certification and assemble its members for the vote; majority vote shall be based on number of members. If the chapter/association is unable to assemble members for a vote, a mail vote and/or e-mail vote shall be sent; majority vote shall be based on votes cast. If the vote is passed, formal notification of the relinquishment of the charter/certification shall be sent immediately to the Council Trustee: Alumnae who shall inform Council.
 - Section 3. When the chapter charter or association certification is withdrawn or relinquished, the charter/certification must be returned immediately to Executive Offices. All net assets, including all funds remaining in the chapter/association treasury, shall be transferred to the Delta Gamma Fraternity, an Ohio corporation.
 - Section 4. Upon merger of one alumnae group with another, all net assets from the alumnae group relinquishing its charter/certification may be transferred to the alumnae chapter/association with which the group is merging.

All attempts at revitalizing and/or merging two groups should be made before initiating the disbandment process.

Pre-Disbandment Steps

- RAS/ADC should send out communication to all members in the group’s area detailing the following:
 - Previous steps taken to revitalize the group
 - Results of surveys collected from members
 - Current status of group
 - Proposed next steps/action plan for the group
- This letter should place a final call to action for women in the area asking for women to step up to help revitalize and/or lead the group. *Please see Google Drive for sample of Pre-Disbandment Letter*
- Local women should be given a minimum of two weeks to respond and such timeframe for responses should also be included in the letter.

If there is favorable response to the pre-disbandment letter:

If there is a favorable response to the pre-disbandment letter and at least 8-10 women are willing to step up to help in the revitalization of the chapter, please refer to the revitalization section.

If there is a lack of response to the pre-disbandment letter:

Proceed with the disbandment process as detailed below.

DISBANDMENT PROCESS

Once a pre-disbandment letter has been sent to alumnae group members and there is insufficient support for a group to continue in the area, the RAS/ADC should initiate the disbandment process.

Steps for Disbandment

- Communicate with Regional Director and Alumnae Leadership Team, including Alumnae Development Specialist, about RAS/ADC recommendation for disbandment. Include the following:
 - Steps taken to revitalize the group
 - Results of revitalization survey and pre-disbandment letter
- RAS/ADC initiates vote with local group for relinquishment of the alumnae group charter/certification and disbandment of the group. Please refer to Section II of the Alumnae Group bylaws for voting procedure.
- Local members should be given at least two weeks from email, or paper mail date, to respond to vote to disband and such timeframe should be included in the communication to the membership.
- If the local membership votes in the affirmative to relinquish the charter/certification, the RAS/ADC should prepare the following and send to the Alumnae Development Specialist:
 - Written recommendation for disbandment from RAS/ADC, including steps taken to revitalize the group
 - Results of the vote to disband by the alumnae group
 - Pre-disbandment/Revitalization communication
 - Please see Google Drive for a sample letter to be sent to Council
- Alumnae Development Specialist will prepare packet for review by the Council Trustee Alumnae, who will then present to Council for a vote.

If Council approves the disbandment:

- The RAS/ADC will receive official notification of the disbandment from EO Staff. The RAS/ADC should wait for this final notification prior to initiating the below items:
- The RAS/ADC should ensure that all remaining funds in the group's bank accounts are sent to Executive Offices (Attn: Alumnae Development Specialist) via a check made out to Delta Gamma Fraternity (not Delta Gamma Foundation).
- The RAS/ADC should ensure that the alumnae group's charter/certification are also sent to Executive Offices.
- The RAS/ADC will be responsible for completing the final tax return at the end of the fiscal year.
- The RAS/ADC are responsible for ensuring all social media accounts are deactivated for the group.
- The RAS/ADC will work with Alumnae Development Specialist to personalize the disbandment letter to the affected membership area to include information about other nearby alumnae groups and/or opportunities to volunteer as a collegiate advisor or House Corporation member.

NAME CHANGE PROCESS

Alumnae groups shall be designated by the name of the city in which it is located even if the group encompasses an area outside the city limits. The city for the group name is preferred to allow alumnae to quickly locate a group when moving to a new location and to assist collegiate chapters who wish to locate the nearest alumnae group. Terms before the city name, such as “greater”, are discouraged. All alumnae groups are listed in alphabetical order for the Fraternity’s records and this would have the group located in the “G” listing instead of with the first letter of the city’s name. Only if the group is not able to use a city name should an alternate name be used. In general, use of counties, valleys and other location descriptions should be avoided, as alumnae in a different area of the country may not recognize these names. State names should not be used in group names if possible.

To perform a name change:

- **Review:** Alumnae group name criteria to determine if a change is required
- **Vote:** Vote on status/name change during a local group’s business meeting with quorum and document vote in minutes; or request vote be taken via email to all members with the group who have valid email addresses
- **Submit:** Submit the Status or Name Change Request Form with the minutes stating the date of the meeting.
 - All e-voting should be combined in one email
 - Email submission should be sent to Council Trustee: Alumnae, RAS, and Alumnae Development Specialist at EO

If Council approves the name change:

- Change your name at your bank
 - The bank may need a letter from the ADS at EO certifying that the group is a 501(c)7 sub-corporation of Delta Gamma Fraternity. The group president or vp: finance should place the request with EO, copying their RAS or ADC.
 - Proof of sub-corporation can also be obtained through MJ Insurance

Appendix A: Revitalization Survey

Hello Delta Gamma Alumnae,

When you accepted your bid from Delta Gamma, you joined a lifetime of sisterhood. Delta Gamma alumnae groups provide their members with sisterhood, Foundation, "Doing Good" opportunities, and fun!

The < alumnae group name> is one way Delta Gamma continues to provide this lifetime of membership to you. The Fraternity also promises support and guidance to each of our alumnae groups. As the appointed <Alumnae Development Consultants (ADC) or Regional Alumnae Specialist (RAS)> I, <Name>, are working to help revitalize the <alumnae group name>.

The <alumnae group name> has been inactive and Delta Gamma is looking for women to help with the alumnae group in a variety of ways. No amount of time and energy is too little. We know jumping in and taking on an office may be intimidating, but we need women like you to help. Any help you can offer is great.

Lastly, as one of the <number of members> women in the area we would like to hear from you directly. Please take a few minutes to complete the following survey. Let us know if you can help by taking on a leadership role, what activities you'd like to participate in and any other suggestions you'd like to give. Please complete by <date>, so we can begin planning the revitalization.

If we do not receive a favorable response, the <alumnae group name> will need to look at alternatives such as the possibilities of merger or disbandment.

Thank you for your time.

ITB,

< Contact Information>

Survey questions:

1. How can you help the group?

- I am interested in becoming an officer
- I am interested in serving on the board, but not taking an officer position
- I would like to help plan an event
- I would like to host an event
- I can help make calls to area alumnae regarding events

2. If you are interested in becoming an officer, which board positions are you interested in? Most positions require less than 5 hours of commitment per month.

- president - oversee group operations, assist board members to fulfill duties as needed
- vp: programming- oversee the group's calendar
- vp: membership- oversee all membership outreach and engagement, welcome new members
- vp: finance- the treasurer
- vp: Foundation- oversee the group's Foundation awareness and fundraising efforts
- vp: communications- oversee email, newsletter communications and social media if there is not a social media chair
- website/social media chair- manage group's website and social media
- Panhellenic- represent Delta Gamma on the local alumnae Panhellenic
- Columnae chair- liaison between the alumnae group and collegian chapter to coordinate programming and support
- Other: (fill in your needs)

3. If you are not interested in serving on the alumnae board, but would like to serve Delta Gamma in one of these ways, please indicate:

- As a collegiate adviser
- On a house corporation

4. Would you likely be active with this group (either by being on the board or by attending an occasional event)?

5. Please explain what has kept you from being involved in the past:

- I am new and didn't know anyone
- I don't have the time
- I don't wish to be active with the Delta Gamma group.
- I didn't know there was a Delta Gamma group in the area
- I don't like the types of programming offered.

6. What types of activities would you like to participate in?

- social
- networking
- collumnae
- service
- dinners
- cultural
- Foundation
- Family-friendly
- Athletic events
- Happy hours
- Educational events
- other

7. What time of day would you like to see events

8. What days of the week would you like to see events held?

9. How far are you willing to travel to an event?

10. In what way do you support your membership of Delta Gamma?

- I pay my per capita dues directly to EO each year
- I pay my local dues
- I pay both local and per capita dues
- I am a 50+ year member
- I am unable to pay dues at this time, but would still like to be involved
- I support the Delta Gamma Foundation

Member Information: (This information will help us contact you for future events.)

- Name:
- Email:
- Phone number:
- Mailing Address:
- Chapter and year of Initiation:
- Special Skills:
- Is there anything else you would like to share to make our group better?