

## Guidelines for Success: Alumna Initiate Process

### Section 1: What an Alumnae Group Needs to Know

#### THE APPLICATION PROCESS

- **Meeting a Candidate:** Sometimes an alumna initiate candidate will already have a strong Delta Gamma connection through friends or family. Other times, a candidate will reach out to Executive Offices to inquire about joining, and Alumnae Services will link them with the closest alumnae group to their location. Both avenues for engagement are equally valid and are an opportunity for your group to get to know women in your community who could be future sisters and leaders in our organization. Please invite a candidate to your group's upcoming events, reach out for coffee or dinner, and make her feel at home.
- **Setting the Timeline:** The candidate and alumnae group should work together to set a timeline for the AI process that makes sense for everyone. For candidates referred to your group, it could take some time for her to meet your sisters and get involved. This is okay! When setting a timeline, sometimes it helps to look at your local collegiate chapter's calendar to determine when they participate in primary recruitment and when they are planning to host Initiation. Once a candidate begins submitting application documents to EO, we must have a completed application within one calendar year.
- **Choosing a Sponsor:** During the application process, a candidate must identify a Delta Gamma member to serve as their sponsor. For candidates that already have a DG connection, that person may serve as their sponsor. All candidates, though, are welcome and encouraged to choose a sponsor from within the alumnae group they will be participating in. A sponsor does not have to be chosen the first time a candidate is meeting with an alumnae group but should be identified as soon as is comfortable for the candidate and group. The sponsor completes part of the application packet, attends Initiation with the candidate, and serves as an overall DG mentor for the woman as she joins our sisterhood.
- **Completing the Application:** Once a sponsor is chosen, the candidate can begin her application. The application forms can be found in the Delta Gamma Library. All completed documents can be submitted to EO via email. Her packet should include the following:
  - Alumna Initiate Application
  - Letter of Intent (from candidate)
  - Alumna Initiate Recommendation Form (completed by sponsor)
  - Letters of Recommendation (two total; one can be from the sponsor)
  - Endorsement Form (optional; completed by an alumnae group or collegiate chapter)

- **Endorsing a Candidate:** After having ample opportunity to get to know the candidate, an alumnae group or collegiate chapter may vote to endorse the candidate for membership. This vote to endorse should be based on the group's collective knowledge of the candidate. The vote can be held in person or electronically, as long as your membership has been given one-week notice that the vote is taking place. Only members in good standing, who have paid their alumnae per capita and local dues in the current fiscal year, are eligible to vote. Once the vote has taken place, the group's president can complete the Endorsement Form and submit it to EO. An endorsement from an alumnae group or collegiate chapter is encouraged, but is not required.
- **Receiving Approval from Council:** Once all application documents have been received, EO will submit her completed application packet to Council for final approval. Council meets about twice per month, so it is important to have all application documents submitted to EO at least one month prior to the intended date of Initiation. The alumnae group cannot facilitate the Initiation of a candidate without first receiving Council's approval. Council's decision will be sent via email from EO.

## PLANNING FOR INITIATION

- **Acceptance and Payment of Fees:** Within 30 days of Council's invitation for membership being sent to a candidate, the woman should mail her acceptance and Initiation fees to EO. These must be paid by check or money order. Sometimes an alumnae group will pay these fees for the woman, but most often the candidate will pay them herself. The candidate should also submit a signed Alumna Initiate Statement of Obligation before Initiation.
- **Scheduling Initiation:** Once the Initiation fees have been processed, the sponsor should work with the local collegiate chapter to schedule Initiation. The sponsor and candidate should plan to attend the collegiate chapter's next regularly scheduled Initiation, schedules permitting. If a scheduling conflict occurs, please work this out with the collegiate chapter.
- **Educating the Candidate:** Prior to Initiation, the alumnae group should help identify an alumna member willing to serve as the candidate's educator. This is often the same person as the sponsor, but it does not have to be. EO has created an Alumna Initiate Training Webinar that we suggest the educator and candidate watch together and discuss. There are points throughout the recording where you are prompted to stop and talk further. The educational component of the AI process should be completed prior to Initiation. To obtain the link to the training webinar, please contact Alumnae Services at EO.

- **Attending Initiation:** The sponsor should plan to attend Initiation with the candidate and bring a badge for the candidate to borrow during the ceremony. The pair is welcome to also attend the Inspiration ceremony that week, but that is optional. Sometimes, a local alumnae group will have an Inspiration ceremony themselves prior to attending the collegiate Initiation ceremony. Additional members of the alumnae group can attend Initiation in support of their new member, as long as this is communicated to the collegiate chapter in advanced.

## POST-INITIATION

- **Confirming Initiation:** After the ceremony takes place, it is important for the sponsor to confirm with EO that the candidate was indeed initiated. Then staff can create the member's profile, which will place her on an alumnae group's roster based on her zip code. Information will be emailed to the initiate about purchasing a badge or member certificate, if she would like.
- **Getting Involved:** Once your candidate has been initiated, this is just the beginning of her Delta Gamma journey! It's important that her sponsor continues to help her foster connections within the alumnae group and find her place. An alumna initiate's membership is not "honorary" but is the same as that of any other Delta Gamma. She is welcome to serve as a volunteer or in leadership at any level, and should be encouraged to do so, as it fits her skills and interests.

## Section 2: What the RAS/ADC Needs to Know

### THE APPLICATION PROCESS

In addition to everything listed in the Alumnae Group section above, the RAS/ADC should keep the following tips in mind:

- **Meeting a Candidate:** If a candidate contacts EO to get involved, we will link her with the closest alumnae group to her location. This could be a chapter or an association; the group's status should not impact the application process. Staff will copy the RAS/ADC onto the initial email to the alumnae group so you can stay in the loop about any AIs amongst the groups you oversee. If you live in close proximity to the alumnae group or candidate, you're welcome to meet up with her or attend an event together if you would like. Sometimes it helps for the RAS/ADC to check in periodically with their groups to ensure they have reached out to any candidates they have been linked with.
- **Completing the Application:** As the RAS/ADC, if you have met the candidate, you are welcome to participate in her application process by sponsoring the candidate or providing a letter of recommendation. Having the endorsement of a regional team member is not a requirement of the AI application process, though, so the alumnae group can usually provide all necessary letters from within their group.
- **Endorsing a Candidate:** Sometimes an alumnae group will have questions about the best way to conduct a vote to endorse a candidate, which a RAS/ADC can help them determine. Also, if a group thinks they will likely vote against endorsing the candidate for Initiation, it's best if they discuss this situation with the RAS/ADC before holding the vote. During this conversation, it will be important for you to determine why they feel the candidate is not a fit for Delta Gamma (based on membership criteria, not only on the candidate's commitment to their local group) and if they have allowed enough time to get to know the candidate before voting. After having this conversation, a RAS/ADC should inform Alumnae Services at EO. An endorsement from an alumnae group or collegiate chapter is encouraged, but is not required.
- **Receiving Approval from Council:** When Council votes to approve a candidate for Initiation, the RAS/ADC will be copied on communication from EO outlining next steps. At this point, the local alumnae group and collegiate chapter typically work out the details of Initiation, and the RAS/ADC is less involved.

## Section 3: What the Collegiate Chapter Needs to Know

### THE APPLICATION PROCESS

Generally, an alumna initiate candidate will be linked with an alumnae group and helped through the application process by her sponsor from within that group. Once the candidate has been approved for Initiation by both the local group and Council, the collegiate president and ATC will be brought into communication when it is time to plan Initiation. If this is the case, skip to the section below on planning for Initiation.

But a collegiate chapter can also endorse an alumna initiate candidate for Initiation! If you have a woman who has a connection with your chapter and is not already a member of a sorority (like a mom, faculty adviser, or community volunteer), she may be a great candidate for the AI program. If your collegiate chapter would like to pursue Initiation for one of these women, the following guidelines should help:

- **Meeting a Candidate:** If your chapter is considering the alumna initiate program, it's likely that you already have a relationship with the person you have in mind. It's important to talk with this person about your idea to initiate her to see if she is interested. The AI program is not an "honorary" Initiation and can not be done as a "surprise"; if initiated, she would be granted the full privileges and responsibilities of alumna membership.
- **Setting the Timeline:** From the beginning, it helps to have a timeline in mind for completing the application process. When setting a timeline, it helps to look at your chapter's calendar to determine when you are planning to host Initiation and work backwards from there. Once a candidate begins submitting application documents to EO, we must have a completed application within one calendar year.
- **Choosing a Sponsor:** During the application process, and candidate must identify a Delta Gamma member to serve as their sponsor. For candidates that already have a connection with your chapter, it makes sense for one of you to serve as the sponsor. If the candidate also has family or friends who are members of Delta Gamma, they are welcome to be her sponsor. The sponsor completes part of the application packet, attends Initiation with the candidate, and serves as an overall DG mentor for the woman as she joins our sisterhood.

- **Completing the Application:** Once a sponsor is chosen, the candidate can begin her application. The application forms can be found in the Delta Gamma Library. All completed documents can be submitted to EO via email. Her packet should include the following:
  - Alumna Initiate Application
  - Letter of Intent (from candidate)
  - Alumna Initiate Recommendation Form (completed by sponsor)
  - Letters of Recommendation (two total; one can be from the sponsor)
  - Endorsement Form (optional; completed by an alumnae group or collegiate chapter)
- **Endorsing a Candidate:** After having ample opportunity to get to know the candidate, an alumnae group or collegiate chapter may vote to endorse the candidate for membership. This vote to endorse should be based on the group's collective knowledge of the candidate. The vote can be held in person or electronically, as long as your membership has been given one-week notice that the vote is taking place. Only members in good standing are eligible to vote. Once the vote has taken place, the chapter president can complete the Endorsement Form and submit it to EO. An endorsement from an alumnae group or collegiate chapter is encouraged, but is not required.
- **Receiving Approval from Council:** Once all application documents have been received, EO will submit her completed application packet to Council for final approval. Council meets about twice per month, so it is important to have all application documents submitted to EO at least one month prior to the intended date of Initiation. The collegiate chapter cannot initiate a candidate without first receiving Council's approval, which will be sent via email from EO.

## PLANNING FOR INITIATION

- **Scheduling Initiation:** Once an alumna initiate candidate has accepted her invitation for membership, the president and ATC will be contacted by the sponsor or alumnae group president about attending your next collegiate Initiation ceremony. The collegiate chapter is not required to do anything different for an AI than they would for a collegiate new member during Initiation, and the AI can be initiated with a group of collegians during the same ceremony. If the sponsor and candidate are not available during your chapter's next-scheduled Initiation, they can plan to attend the following semester, or you can perform an additional Initiation for the alumna initiate. This is between the collegiate chapter and the alumnae group to figure out. A candidate and sponsor may also be interested in attending the Inspiration ceremony that week, but it is not required for the AI process.

- **Educating the Candidate:** Prior to Initiation, the AI candidate will participate in education about Delta Gamma’s history, accomplishments, and values. If an alumnae group has voted to endorse a candidate for membership, they will be responsible for ensuring the education takes place. If the collegiate chapter has voted to endorse a candidate for membership, they should take ownership of the candidate’s pre-Initiation education. EO has created an Alumna Initiate Training Webinar that we suggest the educator and candidate watch together and discuss. There are points throughout the recording where you are prompted to stop and talk further. The educational component of the AI process should be completed prior to Initiation.
- **Attending Initiation:** The sponsor should plan to attend Initiation with the candidate and bring a badge for the candidate to borrow during the ceremony. Additional members of the alumnae group may want to attend Initiation in support of their new member, so it may be helpful to check with the group about how many people are coming.

## POST-INITIATION

- **Confirming Initiation:** After the ceremony takes place, it is important for the sponsor to confirm with EO that the candidate was indeed initiated. The collegiate chapter does not need to submit the AI on any tasks in Anchorbase or worry about adding them to the chapter roster. Staff will create the member’s profile, which will place her on an alumnae group’s roster based on zip code. Information will be emailed directly to the initiate about purchasing a badge or member certificate, if she would like.
- **Getting Involved:** Once your candidate has been initiated, this is just the beginning of her Delta Gamma journey! It’s important that she has the opportunity to participate in alumnae events, attend Founder’s Day, and volunteer at the local level, so make sure she’s on your invitation list. An alumna initiate’s membership is not “honorary” but is the same as that of any other Delta Gamma. She is welcome to serve as a volunteer or in leadership at any level, and should be encouraged to do so, as it fits her skills and interests.