



Guide to Building a New Chapter

Introduction

Welcome to Alpha Phi Omega, the nation's foremost campus-based, inclusive, service-oriented, leadership development organization for university/college students. Our cardinal principles are Leadership, Friendship and Service. The fraternity's four fields of service are Campus, Community, Nation and Fraternity.

Alpha Phi Omega was founded in 1925 at Lafayette College in Easton, Pennsylvania. Today, Alpha Phi Omega has active chapters at more than 360 universities/colleges nationwide. Currently there are approximately 24,000 active chapter members and over 250,000 living alumni. Alpha Phi Omega is the single most representative undergraduate intercollegiate organization in the United States of America.

This Fraternity was founded upon the principles of the Boy Scouts of America, and, for a while, was the official fraternity of the Boy Scouts. Although the fraternity still works closely with the Boy Scouts, its service program has grown to include several other youth service organizations such as America's Promise, Youth Service America, and Camp Fire U.S.A.

Membership in Alpha Phi Omega is open to all enrolled students and is as diverse as the college population itself. We do not tolerate any form of hazing. Although we are a fraternity and our members are referred to as 'Brothers', membership in Alpha Phi Omega is open to any college student, regardless of gender. 'Fraternity' implies a common bond and alliance that is life long. It involves the unselfish sharing of ideas, interests, successes and even failures. We believe that is what Alpha Phi Omega is all about.

Each chapter, operating under our National Bylaws and Standard Chapter Articles of Association, recruits its own membership, selects its leadership and develops its service program. University/college approval is required for each chapter to be in good standing with the National Fraternity.

Nationally, Alpha Phi Omega is governed by a biennial National Convention composed of student delegates from each chapter. Voting delegates at each convention consider legislation, elect a volunteer National Board of Directors, and set fees and priorities. The National Office in Independence, Missouri, provides supplies and other resources and coordinates national educational programs, such as leadership development workshops, service exchanges and national programs.

Building a new chapter of Alpha Phi Omega is a substantial undertaking. It requires patience, time and dedication; however, it can be a tremendously rewarding and fulfilling experience for all involved. We hope that you will join us in helping to bring leadership, friendship and service opportunities to every college student in America.

Visit our website: www.apo.org

Table of Contents

Guide to Building a New Chapter

Introduction & Table of Contents

Using This Guide.....	1
Section 1: Overview of the Extension Process	2
Important Contacts.....	4
Section 2: Rights and Limitations During the Extension Process.....	5
Section 3: Prospective Group Overview & Checklist of Requirements to Become an Interest Group.....	6
Section 4: Interest Group Overview	7
Checklist of Requirements for Achieving Petitioning Group Status.....	9
Section 5: Petitioning Group Overview	10
Checklist of Requirements for a Chartering Application.....	12
Section 6: Chartering Chapters and Aftercare	15

Forms

- DE-1, Authorization to Conduct Activities on Campus Form (received from school prior to receiving the information in this guide)
- Requirements for Achieving Interest Group Status
- DE-2 & 3, Service Report Forms
- DE-4 & 5, Fellowship Report Forms
- DE-6 & 7, Leadership Development Forms
- DE-8, Additional Requirements
- DE-9, Officer Transition Report
- DE-10, Standard Chapter Articles of Association Certification
- SS-4, IRS Application for EIN (submitted with paperwork for chartering unless a number already exists for an inactive chapter)

Applications

- DE-11, Application for Petitioning Group Status
- DE-12, Application for Charter

Resources

- National Bylaws & Standard Chapter Articles of Association—also available at:
<http://www.apo.org/publications/documents/bylaws.pdf>
- Pledge Manual (**Leadership Friendship Service**)—also available at:
<http://www.apo.org/publications/documents/pledgemanual.pdf>
- APO Glossary
- Risk Management Policies (in Pledge Manual)
- Membership Policies (in Pledge Manual)
- Sample Chapter Bylaws
- A Short Guide to Writing Chapter Bylaws
- APO Tasks and Requirements for Chartering
- In Search of an Advisor—available at:
http://www.apo.org/publications/documents/advisor_search.pdf
- APO *IMPACT* Guides (Officer's Handbooks)—available at www.apo.org Publications and Forms

APO *Impact* Guide - Alumni Relations Officer

APO *Impact* Guide - President

APO *Impact* Guide - Communication

APO *Impact* Guide - Conference Chair

APO *Impact* Guide - Electronic Committee

APO *Impact* Guide - Fellowship Officer

APO *Impact* Guide - Historian

APO *Impact* Guide - Interchapter Relations

APO *Impact* Guide - Introduction to Extension

APO *Impact* Guide - Leadership Officer

APO *Impact* Guide - Marketing Officer

APO *Impact* Guide - Membership Vice President

APO *Impact* Guide - Pledge Trainer

APO *Impact* Guide - Recruitment Officer

APO *Impact* Guide - Secretary

APO *Impact* Guide - Senior Guide

APO *Impact* Guide - Sergeant-At-Arms

APO *Impact* Guide - Service Project Leader

APO *Impact* Guide - Service Vice President

APO *Impact* Guide - Treasurer

- APO Charter Approval Progress Checklist

USING THIS GUIDE

This guide was developed by the National Membership and Extension Committee to help explain the process of building a new chapter in a clear and concise manner. It contains all of the fundamental information needed to guide you through this process. In addition, every member of the group working towards building the chapter should be given a copy of a booklet containing a condensed version of this guide and a copy of the Pledge Manual. In addition to these materials, there are various other resources available to help you. Many of these materials are available for download at the Alpha Phi Omega (APO) official website, www.apo.org. Throughout this guide when it talks about “you” it is referring to you as the leader of the chartering effort. The guide is designed to give you a great deal of information about this process. Please take the time to read it and process it at your own pace. It can either be used as a step by step guide or something to be read all at once, depending on your own comfort level.

Section 1 of this guide contains information designed to introduce you to the process of building a new chapter. After receiving this guide, you should immediately review this section in order to develop an understanding of the extension process.

Section 2 of this guide contains information about some of the rights and limitations your group will have within Alpha Phi Omega while you work towards creating a chapter. As your group progresses toward becoming a chapter it will gain more rights, but it also will operate under restrictions that do not apply to active chapters.

Sections 3-6 help guide you through the requirements to establish a new chapter. Each section includes an overview of a stage of the process as well as a checklist to help your group stay organized and on track as you progress through the requirements. You will note that various words or phrases are bolded in these sections. This is to alert you that you can find a definition of that word or phrase in the APO Glossary at the back of this guide.

You do not have to complete the requirements in the order they are presented on the checklists within each section. You should complete the requirements in the order that works best for your group; however, the three stages of the process must be completed in order and your group cannot progress from one stage to the next until all the requirements for the current stage have been completed. You will also find an overall list of tasks and requirements in the resource section of the Guide to Building a New Chapter binder, this list will provide you with a clear list of the objectives to be completed and will help you organize what you and your group will need to accomplish.

If you ever have any questions or comments about this guide or process, please contact Ashlee Sundermann, Manager – Chapter Administration using the contact information below:

Alpha Phi Omega
14901 East 42nd Street
Independence, MO 64055-7437
(816) 373-8667 x 17
Chapter.admin@apo.org

SECTION 1

Overview of the Extension Process

There are several steps in the process of building and developing a new chapter. The Fraternity calls this process the extension process because it is extending Alpha Phi Omega to new campuses or campuses where chapters once existed. The purpose of the extension process is to create sustainable Alpha Phi Omega chapters that will serve their campus and their community for many years to come. The requirements of the extension process are designed to help the group develop the programs and procedures needed to be a healthy and sustainable chapter. This process has several phases that are reviewed below. The process for starting a chapter on a campus that never had a chapter or reviving a chapter at a campus where a chapter previously existed is the same. The only difference is that in the case of a re-chartering effort the Greek letter designation the group will receive upon becoming a chapter is known at the start of the process. The group will not be allowed to use that Greek letter designation until they have been approved as a full chapter of Alpha Phi Omega.

Alpha Phi Omega is a collaborative partner with your college or university. A chapter can only be formed if the school administration approves of the presence of Alpha Phi Omega on campus. As an organization with over eighty-five years of experience, we recognize how important the support and buy-in of the school is to the existence and productivity of our chapters. That is why our charters are granted to the host schools rather than the students of the chapter. The students who belong to an Alpha Phi Omega chapter are the stewards of the charter and responsible for making sure that the chapter lives up to the Fraternity's ideals of Leadership, Friendship and Service.

It is critical to remember that at the end of this process, you and your group will be required to collect and submit a great deal of data. It will be much easier if you document everything along the way and keep track of it as you go forward. Remember to keep at least one copy of everything you submit, for your records. Some groups have used tools like Google docs or Sky drive to keep documents in a place that is easily accessible to more than one person.

When your group starts out, it is referred to as a **Prospective Group**. This means your group is considering starting a chapter of Alpha Phi Omega. This is when your group explores what Alpha Phi Omega is, what it takes to become an Alpha Phi Omega chapter and what kinds of things chapters do.

Once your group has decided that Alpha Phi Omega is the right fit for your group and your campus, you will need to complete a series of steps to attain **Interest Group** status. This status is the first official recognition of Alpha Phi Omega. The requirements to become an Interest Group are fairly simple. Completing the Prospective Group phase should be a relatively quick process taking only a few weeks. The most significant step that needs to be completed is gaining permission from your school to proceed. As noted above, Alpha Phi Omega grants charters to the host institution, not to the student members of the chapter. The Prospective Group phase is primarily administrative in function and designed to ensure that both the host institution and Alpha Phi Omega have granted permission for this group to move forward. It is also designed to be informative. The members of the Prospective Group will learn about Alpha Phi Omega's ideals and structure and learn about the extension process. Finally, each member of the Prospective Group must review and agree to follow the Fraternity's Membership and Risk Management policies.

In order to help and guide you through this process, your group will be assigned a **Sponsor**. A sponsor is a specifically designated and trained volunteer whose primary responsibility will be to assist you and facilitate this process. This individual will be a resource of information and support for the group. It is not the responsibility of the sponsor to do the work for you, but rather to support and assist your group as the work is accomplished.

Once the group has become recognized as an Interest Group, the next step to move forward is to be recognized as a **Petitioning Group**. At least 5 members are needed to move onto the Petitioning Group phase. The timing between achieving Interest Group status and Petitioning Group status can be as short as a few weeks. Like the Prospective phase, the Interest Group phase is also designed to be informative. It is a time to recruit new members. The new members will learn about Alpha Phi Omega's ideals and structure and learn about the extension process. Again, each member of the group must review and agree to follow the Fraternity's Membership and Risk Management policies.

Petitioning Group status is the longest part of the extension process. This part will take at least 20 weeks and not more than 45 weeks. The reason this part takes such a long time is that this is where all of the major work of developing into a chapter occurs. During this process, the group develops all of the aspects of a functional chapter of Alpha Phi Omega. This also means that your group will participate in the same required projects as active chapters such as **National Service Week** and **Spring Youth Service Day**, as well as participating in a Chapter Assessment and Planning Session (**CAPS**).

Like the earlier steps, this is an educational process as well. Everything done by the Petitioning Group will have a direct impact on creating a sustainable and healthy chapter that is a productive and beneficial part of their campus and community. In a sense, you and your fellow group members are creating a not-for-profit service provider from the foundation up. It is critical that the foundation is strong and the group develops skills and practices that will promote APO's core values of Leadership, Friendship and Service.

Once your group has completed the requirements, it will complete and submit an Application for Charter. Submission of the application does not guarantee approval. That being said, one of the primary responsibilities of the sponsor is to coach your group on how to properly complete all of the chartering requirements so that when your chapter is ready to submit your application, it will be a successful one. The sponsor is trained to assist and facilitate the extension process; however they are also specifically asked to not complete this process for you. Fundamentally, Alpha Phi Omega is an organization that is student-driven. Students need to take ownership of the extension process and move that process forward to its successful completion, the chartering of a healthy chapter that will operate on its campus for many years to come. Besides your sponsor, many other volunteers, such as the **Section Chair, Region Director**, other area volunteers and the Fraternity's National Office staff will help guide your group to the successful completion of the journey to become a chapter.

After your group has achieved the goal of becoming a chapter, the newly chartered chapter will continue to be supported through a process called **Aftercare**. This process is in place to help support new chapters as they move forward and their new members learn from the students who have come before them.

Alpha Phi Omega provides wonderful opportunities to learn and grow. It is important to recognize that forming a new chapter should be a fun and enjoyable process, even while it is a great deal of work. Creating a chapter and the bonds of brotherhood is truly an experience like no other. The friends you make throughout this process will be life-long and will become some of the most important people in your life.

IMPORTANT CONTACTS

During the time of your chartering process you will get to know some key people: your school's Student Activities Office contact (or equivalent), your Section Chair, your Region Director and your group Sponsor. Please use the space below to fill in the names and contact information of these important people.

Student Activities Office Contact: _____

Phone Number(s): _____

Address: _____

E-mail: _____

Section ____ Chair: _____

Phone Number(s): _____

Address: _____

E-mail: _____

Region ____ Director: _____

Phone Number(s): _____

Address: _____

E-mail: _____

Sponsor: _____

Phone Number(s): _____

Address: _____

E-mail: _____

Other Important Contact: _____

Phone Number(s): _____

Address: _____

E-mail: _____

SECTION 2

Rights and Limitations During the Extension Process

As you work towards creating a chapter of Alpha Phi Omega, your group will gain increasing rights and privileges while moving through the extension process, but it also will operate under restrictions that do not apply to chapters.

One of the activities you will start engaging in early in the extension process, and continue throughout it, is recruiting new members. In the Interest Group and Petitioning Group phases, you can take advantage of a number of materials created by the National Office and supplied to Petitioning Groups and Interest Groups free of charge. . These include publicity brochures and other materials.

It is important that you understand how you are allowed and not allowed to use the Alpha Phi Omega name when you describe your group to potential new members and others or create publicity materials, t-shirts and other paraphernalia. The underlying principle is that it must be clear to an observer that your group is not yet a chapter. Interest Groups may use the words “Alpha Phi Omega” as long as the group also identifies themselves as an Interest Group. Interest groups may *not* use the Greek letters, ΑΦΩ, in any materials. Petitioning Groups may use the words “Alpha Phi Omega” or the Greek letters, ΑΦΩ, as long as the group also identifies themselves as a Petitioning Group. If your extension effort is a re-chartering effort, your group may not use the Greek letter chapter designation during the extension process. (For example, “Big University Alpha Phi Omega Interest Group” is permissible but “Zeta Zeta Zeta Alpha Phi Omega Interest Group” is not.

Petitioning Group members are encouraged to wear the official Petitioning Pin as a visible sign of their objective to form an Alpha Phi Omega chapter. The Petitioning Pin must be worn prominently on clothing that displays the Greek letters, ΑΦΩ. However, Interest Groups may not wear other Alpha Phi Omega jewelry or clothing that indicates individual membership in Alpha Phi Omega.

It is important for your group to participate in events with other chapters. Interest Group and Petitioning Group members have the right to attend sectional, regional and national conferences. During the business portion of a National Convention, Petitioning Groups have right to be represented by two delegates, who have a voice in the proceedings but no vote. Your group also has the right and privilege of participating in APO LEADS courses, APO Impact Webinars and Membership Academies. These courses are all designed to give you skills to improve your groups programming and hone individual leadership skills.

As a Petitioner, if you have participated in the Petitioning Ceremony, you may witness other Petitioning Ceremonies. Until you are initiated as a full member, you may not witness any other ritual of Alpha Phi Omega

SECTION 3

Prospective Group Overview

This is the initial stage of this process. At this point, Alpha Phi Omega and its core values and ideals are something you are exploring. Starting a chapter is not a decision that you should undertake lightly, and we expect that you and your fellow students are going to think it through thoroughly before you decide that you want to pursue creating a chapter. While you are considering whether or not the fraternity is a fit for you and your campus, you are considered a Prospective Group. If your group decides to move forward and start a chapter of Alpha Phi Omega, there are certain steps you must complete to become recognized as an Interest Group, the next step. Interest Group status is the first formal recognition of your group's intent to become a part of Alpha Phi Omega. The requirements that you need to meet to achieve this recognition are listed below. The process to become an Interest Group is administrative and observational, meaning there are steps that require the completion of paperwork and steps that require your participation and observation.

Checklist of Requirements to Become an Interest Group

- The fraternity must be contacted by a student or a faculty or staff member at the campus who expresses interest in starting a chapter; or, on behalf of the Fraternity, a regional director and the Membership and Extension Director agree to target a campus.
- Written permission from an appropriate school official to conduct an extension effort on the campus must be received by the appropriate Fraternity official as designated by either the Executive Director or the Membership and Extension Director.
- Before an extension effort may proceed, the Fraternity's written permission must be received.
- A Fraternity orientation must be completed with interested students, faculty and staff members by a designated fraternity official.
- An extension process orientation must be completed with interested students and faculty/staff members by a designated fraternity official.
- There must be students on the campus who have confirmed that they want to move forward with the process of creating an Alpha Phi Omega Chapter.
- All members, students and advisors, of the group must sign an Affirmation of Compliance with the Fraternity's Risk Management Policy and Membership Policies.
- Form DE-1, Authorization to Conduct Activities on Campus Form must be submitted to the designated fraternity official if it has not yet been submitted.
- The Requirements for Achieving Interest Group Status form must be completed and approved by the designated fraternity official

SECTION 4

Interest Group Overview

To move from Interest Group status to Petitioning Group status is normally a quick process. Like the Prospective Group phase, this phase is also mostly administrative. Also, recruiting begins in earnest at this level. In order to proceed to the next phase of the process, you are required to have at least five (5) students interested and committed to developing Alpha Phi Omega.

One of the administrative processes that will happen during this phase is the establishment of a permanent campus mailing address. This is the address that the National Office will use when it sends materials to your extension group. This address could be a dedicated campus mailbox, the office address of an advisor, or in care of a campus office (e.g. the Office of Student Life) that agrees to accept mail for the Interest Group. This mailing address may *not* be the private mailing address of any individual.

A group email address may also be set up at this time. Ideally, this address should be something that multiple members of the group can access rather than a personal address so that the group doesn't lose access to it if one person becomes unavailable. (An example might be something like *apo-universityofmembership@gmail.com*)

Unless it happened during the Prospective phase, your group will be assigned an alumni volunteer called a **Sponsor** to assist you in the extension process. Your sponsor's primary responsibility is to support and guide your group through the process of building and developing your chapter. It is not your sponsor's responsibility to do the work of building a chapter for you. Instead, they are there to support your group as you take on the challenge of forming a chapter.

At this point, your priorities are still administrative; however, there is nothing that precludes the group from moving forward with recruiting, program development and service projects. Recruiting enough members to advance to the next phase of the process is a critical step. Finding a service project or two and using them as recruiting tools is one option for your group to consider.

All active chapters of Alpha Phi Omega are required to have four (4) advisors. Two (2) of these advisors are required to be employed by the school in some way. One (1) advisor is classified as a Scouting/Youth Services Advisor. Their purpose is to help connect your group with projects connected to Scouting and serving other youth organizations. The last advisor is a Community Advisor. This advisor can be anyone in a position to help your group succeed. These advisors are resources for your group and it is strongly encouraged that you find them as soon as possible. When your group selects advisors, it is important to keep in mind that you are looking for individuals who will be engaged in helping and supporting your group. Advisors can help provide guidance and support as the group moves forward.

As groups start to grow and formalize, often leaders make themselves apparent. There is usually a person who naturally ends up in charge. Sometimes, it is one of those people that are amazingly organized, other times it is the person who can manage a large crowd easily. It is not enough for a chapter to have one leader whom everyone follows. One of the things that will be decided by the group is how the chapter will be structured to divide up leadership responsibilities. Alpha Phi Omega has some basic requirements for this, however, for the most part it is up to the group to decide how to organize themselves. The leadership structure of the group will change as you move from Interest Group to Petitioning Group and on to becoming a chapter. That is natural and it is

important that those changes are a result of conscious decision-making rather than just happening. From the beginning, your group should work to build an operational structure that is based on job descriptions rather than the skills and personalities of the people who happen to be holding the jobs at the moment. From the beginning of the Interest Group phase the group should be thinking about what type of structure (officers, committees, procedures and policies) will be needed to develop the processes that are required to charter and be a successful chapter.

While you are working on completing the requirements to become a Petitioning Group, your section chair and region director will be working together to identify a **big brother chapter**, who will serve as a role model and resource for your group. Working with a big brother chapter gives your group the opportunity to observe how a chapter plans and executes a service project, conducts its meetings, holds fellowship events, etc. The big brother chapter can also help you with recruitment. Joint events with an existing chapter will help to introduce you to Alpha Phi Omega by providing hands-on experience. One of the benefits of joining a national organization is that there are a number of resources that would otherwise not be at your disposal. The ideas that can be exchanged and the possibilities for learning for both your Interest Group and the established chapter are limitless. Keep in mind that just as every college is different, each APO extension effort is different so your group may not be assigned a big brother chapter or that assignment may happen at a later time. Your section chair and region director will make the decision that they feel gives your efforts to start Alpha Phi Omega the best chance to succeed.

The last step to becoming a Petitioning Group is your first formal ritual in Alpha Phi Omega. It is called the Petitioning Ceremony. The section chair or another designated fraternity official will arrange for this ceremony. It will be performed by active **Brothers** of Alpha Phi Omega. This is a simple ceremony that will welcome you and your group into your first formal individual affiliations with Alpha Phi Omega.

Checklist for Achieving Petitioning Status

- The group must have met the requirements for, and been designated as, an Interest Group.
- The group must have five (5) or more students.
- The Interest Group must have a permanent campus mailing address.
- A fraternity orientation must have been completed with the students and faculty/staff members who have joined the effort since Interest Group status was obtained.
- An extension process orientation must be completed with interested students and faculty/staff members who have joined the effort since Interest Group status was obtained.
- The group must submit Petitioning Group fees for all students and advisors and a completed application for Petitioning Group status signed by all students members of the group.
- All members of the group, students and advisors, must sign an Affirmation of Compliance with the Fraternity's Risk Management Policy and Membership Policies.
- Form DE-11, Application for Petitioning Group Status must be completed and approved by a designated fraternity official
- The group then participates in the Petitioning Ceremony which shall be performed by active members of the Fraternity.

Section 5

Petitioning Group Overview

You are now recognized as a Petitioning Group of Alpha Phi Omega. This part of the process will take a minimum of 20 and a maximum of 45 academic weeks. The reason for the length of this phase is that now is when all of the chapter development processes happen. When you take a moment to look at the list of things you will need to accomplish during this time frame, you might not think that this is enough time. If your group is collaborative and team-oriented, it will not be an issue. The requirements in this process are designed to develop the programs, structure and attitudes of a healthy and sustainable chapter. Each item or action that is asked of your Petitioning Group is a piece of this.

Some of these requirements involve interaction with other chapters in a variety of ways. As a part of Alpha Phi Omega, you become part of a national organization. It is important that you acknowledge your connections to these other chapters and our national Fraternity.

Our cardinal principles and the core values of Alpha Phi Omega are Leadership, Friendship and Service. It only makes sense that there are specific requirements connected to each of these principles. As Leadership, Friendship and Service are each a fundamental piece of an Alpha Phi Omega chapter's program, we view them as we would a three-legged stool. All three legs are necessary for the chapter to function properly. The membership practices and administrative processes of the organization are the seat that connects them together. If you take away one piece, the stool will no longer be able to stand.

A strong chapter is able to plan and implement an active and varied service program. Alpha Phi Omega categorizes service into four fields of service: service to the campus, service to the community, service to youth, and service to the nation as participating citizens. As our chapters are unique and diverse, so are the service programs and projects a chapter develops. Sometimes, projects will find the group. Other times, if your Petitioning Group wants to do a specific type of service, they will have to plan and implement the projects themselves. This is why you are asked to do both. The other piece of the service requirement is participation by members of the group. One of the things that draw people into joining a chapter of Alpha Phi Omega is the opportunity to participate in service as a part of a community. That is why there are participation minimums as a part of the service expectations. The fellowship (friendship) requirements are designed the same way. Part of what makes a service fraternity different than a service organization is the sense of community and camaraderie that the members feel with one another. Most clubs require participation only in the service aspect of their group. Alpha Phi Omega recognizes that all of these pieces put together are what makes a cohesive group.

The leadership requirements are a bit different. Leadership opportunities come in all shapes and sizes. The extension process will bring out several different kinds of leaders in your group. For most people leadership skills are learned rather than instinctive. In Alpha Phi Omega the process of learning leadership skills is known as "Leadership Development". There are a number of different types of development opportunities. Some involve taking classes, others involve learning by doing. One important skill of a leader is the ability to transmit what he or she knows to others. Chapter officers will change frequently. Some chapters elect new officers each semester, others use a calendar year or an academic year. A healthy chapter has a plan for how to transition information and ideas from officer to officer in such a way that little information is lost. It is inefficient and fruitless to

reinvent the wheel each time someone takes over a role. It is important that the officers in any organization share knowledge and experiences with those who succeed them. Critical information that is important for the group's success should be passed forward.

Every organization has governing documents, policies and rules. This new chapter of Alpha Phi Omega that you are building will be no different. Some of the documents that govern your chapter already exist. They are the National Bylaws, Standard Articles of Association and national policies of Alpha Phi Omega; the policies and guidelines of your school; as well as, state, local, and federal laws. Other documents and policies will need to be created by your group. One key document the group must develop is Chapter Bylaws. Your group will need to decide things like officers, roles, election procedures, meeting structures, discipline policies and chapter expectations. The resources section of this binder contains some samples and suggestions for how to approach the project.

Another thing the group will need to develop is a budget and financial plan. After all, a chapter is a small nonprofit corporation and needs a plan for how it will finance its activities. The group should develop an operational budget that outlines expenses, possibly by program or event. You will need to determine how funds will be raised and how much the group will charge for dues. This is also the time to determine how to approve spending requests.

Having a long range plan and a vision for the future of a chapter is another characteristic of a well-organized and solid chapter. As part of the petitioning requirements your group must develop plans for at least the next term in a number of areas. While Alpha Phi Omega recognizes that plans are flexible and change as circumstances change, it is important that your group is looking ahead and planning for the future. The planning and organization of a chapter is an ongoing process. Often groups working on developing a chapter become so focused on achieving the milestone of a charter that they forget to look beyond that. Asking petitioning members to include future plans helps to ensure that the group has a focus past the chartering ceremony.

Throughout the extension process, your group will need to recruit, educate and retain new members. By the time you have completed the petitioning process, your group must have at least twenty-five (25) members (twenty (20) of which must be returning to school the following term) and at least four (4) advisors. Advisors will be crucial to the success of this potential chapter. Alpha Phi Omega requires that every chapter have at least four advisors. Two (2) of those advisors must be employed by the host school (often referred to as "faculty or staff" or "faculty" advisors). Faculty, staff and administrative employees are all eligible for these advisor roles. One (1) advisor represents Scouting or other youth services (often referred to as "Scouting" or "youth services" advisors). This should be someone in a position to assist the group in developing service projects that benefit youth. Finally, one (1) advisor must be from the community (often referred to as the "community" advisor). This advisor should be able to assist the group through their knowledge, experience and contacts. Groups are not limited to four advisors, they may have as many additional advisors as they would like. Advisors can be tremendous assets to a chapter and a strong chapter sets expectations and directions for advisors as to what their role is and how they are being asked to support the chapter. Advisors are there to help your group, whether that is helping navigate the difficult paperwork with the school, mediating a dispute, serving as an objective party when an officer is frustrated, or facilitating projects. The requirements regarding advisor development are here to help your group make the best use of these experienced individuals who want to help you succeed.

As this is a partnership, representatives of Alpha Phi Omega will be involved throughout this process. When all of the requirements are completed, your group will fill out an Application for

Charter that documents all of the group's activities. Your section chair and region director will need to review your application and approve it before it is submitted to the Membership and Extension Director for review and to the Board of Directors for approval.

Checklist for a Chartering Application

- A Petitioning Ceremony must have been conducted for all Petitioning Members.
- The group must have been engaged in the petitioning process for no less than twenty (20) and no more than forty-five (45) weeks. Extensions may be granted by the Membership and Extension Director. "Weeks" is defined as weeks when school is in session.
- The group must have defined leadership positions and responsibilities, filled those positions, and reported the information to the National Office.
- The group must have developed an officer transition plan.
- The group must have gone through at least one transition of the leadership positions and submitted evidence using Form DE-9-Officer Transition Report
- The group must have participated in at least two (2) leadership development activities and documented them on Form DE-6-Leadership Event Report Form where:
 - at least one (1) pertained to the Fraternity's program of leadership development
 - at least one (1) involved members from an active chapter or another extension group.
- The group must have conducted, at least annually, a Chapter Assessment and Planning Session (CAPS) or similar Fraternity approved process and documented it on Form DE-7 Leadership Development Program Summary and with a report of the results of the session.
- The group must have developed a plan for identifying and organizing ongoing leadership development opportunities and trainings documented the plan on Form DE-7 Leadership Development Program Summary and attachments.
- The group must have held at least four (4) fellowship activities and documented them on Form DE-4 Fellowship Project Report Form and Form DE-5-Fellowship Program Summary where:
 - at least one (1) event must have been participated in by at least 50% of the group
 - all events must have been participated in by at least 50% of the group or twelve (12) members whichever is smaller.
 - at least one (1) activity must have involved members of an active chapter or another extension group.
- The group must have developed a plan for identifying and organizing ongoing fellowship opportunities.
- The group must have prepared and submitted all appropriate reports on national fellowship programs required of active chapters during the time it was a Petitioning Group.
- The group must have participated in at least twelve (12) service projects. These projects must be diversified so that: No more than two (2) projects of the 12 may be of the same type or nature with the same organization. The projects must be documented on Form DE-2-Service Project Report Form and Form DE-3- Service Program Summary:
 - At least one (1) project must have involved members of an active chapter or another extension group.
 - All projects must have been participated in by at least 25% of the group or twelve (12) members whichever is less.

- At least one (1) of the projects must have been participated in by at least 75% of the members of the group
- At least 6 projects must have been planned and executed by the group.
- ❑ The group must have participated in all national service programs and performed the reporting required of active chapters during the time it was a Petitioning Group.
- ❑ The group must have developed and implemented a plan for identifying and organizing an ongoing service program.
- ❑ The group must have engaged in a continuous recruitment program during each academic term during the Petitioning Group phase and
 - Have twenty five (25) or more students who are members of the group at the time of the chartering. All of those students must have gone through the petitioning ceremony and have submitted the appropriate registration to the National Office within 10 business days of the petitioning ceremony.
 - have no fewer than twenty (20) student members scheduled to return for the following academic term.
 - recruited four (4) or more advisors which conform to the requirements for chapters in good standing in the National Bylaws.
- ❑ The group must have developed and implemented for all Petitioning Group members a fraternity education program which includes the following elements (at a minimum):
 - History and background of the Fraternity
 - Chapter history, in the case of a rechartering effort
 - Fraternity structure (Nation, Region, Section)
 - Acknowledgement and affirmation of compliance with the Fraternity's Standard Chapter Articles of Association, Risk Management, Membership Policies and Pledging standards
 - Any other requirements defined by the National Pledging Standards
- ❑ The group must have developed and implemented a chapter advisor orientation for new advisors
- ❑ The group must have developed an outline for recruitment, education and retention of future members
- ❑ The group must have developed and documented the following administrative items and summarize them on Form DE-8-Additional Requirements:
 - Chapter Bylaws, which must have been formally adopted by the group and approved by the Region Director or appropriate designee
 - A budget, which must have been formally adopted by the group
 - Systems to facilitate communication with and distribute information to all student and advisory committee members outside of official meetings
 - Registration with appropriate government and/or regulatory agencies for financial purposes.
 - A roster of student and advisory members and their contact information
 - Appropriate record keeping practices to perpetuate the continued offering of program and operation of administrative functions.
 - Appropriate campus approvals to operate on the campus
- ❑ Written permission from an appropriate school official to operate as a chapter the campus must have been received by the designated fraternity official.
- ❑ All students and advisors involved with the group have signed an Affirmation of Compliance with the Fraternity's Risk Management Policy and Membership Policies.
- ❑ The group must have submitted Form DE-10- Standard Chapter Articles of Association Certification.

- The group must have prepared and submitted Form DE-12 Application for Charter along with the completed assemblage of documents and fees required for chartering to the National Office.
- Approval of the Section Chair has been obtained.
- Approval of the Regional Director has been obtained.
- An affirmative vote of the chapters in the section has taken place in accordance with the requirements in the National Bylaws.
- All pertinent information and requirements documentation is submitted to the National Office and Membership & Extension Committee for review and approval.
- Approval by a vote of the National Board of Directors in accordance with the requirements in the National Bylaws has taken place.

SECTION 6

Chartering Chapters and Aftercare

A charter should not be an end point on your journey in Alpha Phi Omega. Consider it a new beginning or a waypoint in your travels. Your brand-new chapter has done a great deal of work to get to this point and it is important that you take some time to celebrate all that you have accomplished on your journey. This group started as friends who had not yet met. You came together to build a chapter based on a simple idea, the belief that leadership through service is important in this world. Now that the group has achieved this milestone, it is time to move forward! There is a tremendous amount of momentum and enthusiasm in a new chapter. Take full advantage of it. This is the time to seek out more projects, build new relationships with community organizations, to explore new avenues of service. It is the time to find all the best in your brothers as you celebrate this new chapter.

The sponsor will stay with you through the first year of your new charter. Their responsibility is to provide some “aftercare” for your chapter. One of the things that can happen is that after a group spends all of that time focused on the goal of becoming a chapter, it can lose that its sense of direction once it becomes a chapter. “Aftercare” is a support plan that Alpha Phi Omega has developed to help ensure that new chapters remain healthy and continue to have strong programs of Leadership, Friendship and Service. In the beginning, the members of your group learned about Alpha Phi Omega from its alumni volunteers, now new members of your group should be learning what Alpha Phi Omega is from the students who make up the chapter. Education of members should remain an ongoing process within your chapter. Productive service programs and membership programs keep chapters healthy. Alpha Phi Omega is a new learning experience every day. There is always something new to try, to do, to learn more about. The learning shouldn’t stop because a milestone is achieved. The strongest chapters recognize this every day and take steps to ensure that there is always room for more knowledge.