

# Chapter Development Guide



**A GUIDE TO CHAPTER  
SUCCESS**

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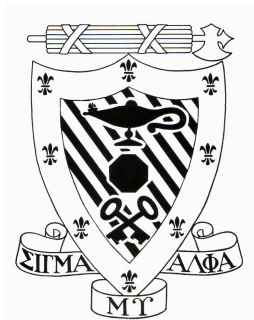
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# *Chapter 1*

## *Welcome to Sigma Alpha Mu*

“Mighty things from small beginnings  
grow.”

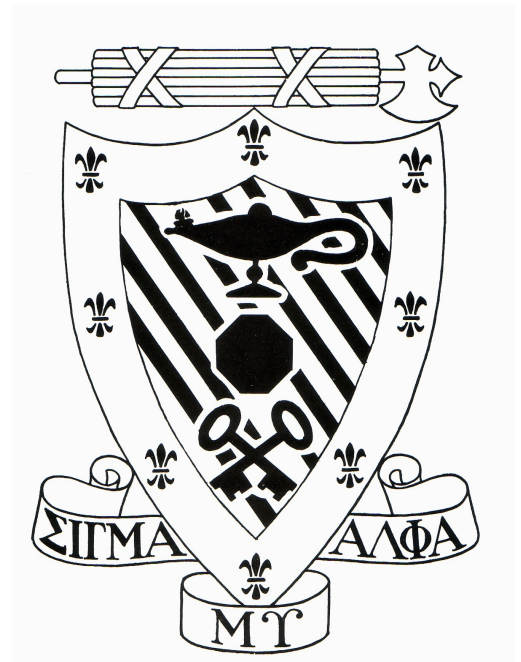
John Dryden



# Creed and Mission

## CREED

*"To foster and maintain among its sons a spirit of fraternity, a spirit of mutual moral aid and support; to instill and maintain in the hearts of its sons love for and loyalty to Alma Mater and its ideals; to inculcate among its sons such ideals as will result in actions worthy of the highest precepts of true manhood, democracy, and humanity."*



## MISSION

The mission of Sigma Alpha Mu is to guide each undergraduate member toward a more meaningful life, to prepare members for responsible fraternity and community involvement, and to create social and service opportunities for its alumni.

# **From Colony to Chapter: Benchmarks to make the leap**

**To be eligible for installation as a chapter, the colony should:**

## **1) Academics**

- a) Be above the all men's average on campus.
- b) Have all members attain a 2.25 for membership in accordance with NIC standard.
- c) Develop a working scholarship program.

## **2) Membership**

- a) Demonstrate healthy growth beyond the initial group.
- b) Demonstrate ability to organize successful recruitment activities and goals.

## **3) Operations**

- a) Demonstrate activities on campus and in IFC (where applicable)
- b) Use the Chapter Performance Standards.
- c) Hold a Philanthropy Activity for Alzheimer's Foundation
- d) Establish a working committee system and monthly committee chairmen meetings.
- e) Establish weekly brotherhood business meetings
- f) Establish weekly Council meetings.

## **4) Financial**

- a) Pay the International Fraternity dues and insurance promptly.
- b) Show financial stability i.e. budget, invoices, Exchequer Reports

# Financial Expectations

## **Undergraduate Dues:** \$\_\_\_\_/man

The chapter/colony is invoiced based upon its roster. Candidates are invoiced upon affiliation. Payment is due within 30 days of the invoice. Each Colony in existence as a Colony for more than 12 months shall pay the annual dues for each undergraduate member of the colony.

## **Insurance:** appx. \$\_\_\_\_/man

All chapters are required by the Blue Book to carry liability insurance. Premiums vary from chapter to chapter based on chapter size (average membership over a three year period), risk management violations, chapter scholarship, Chapter Performance Standards standing, claims history and overall operations. Applications for discounts are due June 1<sup>st</sup> (forms available on [www.sam.org](http://www.sam.org)). Final quotes are given to chapters at Convention. Invoices are mailed by the insurance company in September and premiums must be paid in full to the insurance company by November 1<sup>st</sup>.

*Note: Colonies pay roughly \$\_\_\_\_/since they are new.*

## **Initiation Fee (Life Membership):** \$285/man

This fee must be paid by the candidate and received by the Fraternity office at least three (3) weeks prior to initiation. Life Membership entitles each new initiate to a shingle, Blue Book, standard pin, and all the rights, privileges and obligations as a life member of the Fraternity. *Billed upon initiation (aka chartering) which takes places after meeting requirements from Sigma Alpha Mu.*

## **Educational Pre-Registration (EPR):** \$750/chapter

Pre-registers chapter for required educational programs and is invoiced to chapters in the fall. This automatically registers (5) Chapter Leaders Day delegates, plus (3) emerging leaders (1) Leadership Conference delegate, (1) Undergraduate Interfraternity Institute or Recruitment Boot Camp scholarship,

and a visit by an educational Sharp Shooter. Over a two year cycle the cost to the Chapter is \$1500, but registering individually for all these programs would cost over \$2400. *Billed out once the colony becomes a chapter*

**Convention:** **\$\_\_\_\_/delegate**

Early registration period is March 15th to reduce the cost to \$\_\_\_\_/delegate. Full registration covers hotel, food, and all programs. Transportation is not included! Failure to send the mandated (2) delegates results in a \$1500 fine. *This is required for colonies.*

**Chapter Leaders Day (CLD):** **Free (with EPR)**

This in depth training day in the fall is held regionally for members of council. The program is designed to provide adequate training for the Prior, Vice Prior, Exchequer, Recorder and Candidate Educator. The Colony may also register up to three emerging leaders. Councils also gain valuable tools and knowledge to ensure a successful tenure in office. Real-life case studies are used to train and prepare these leaders. Sending the five required delegates results in a discounted insurance premium by 5% for the upcoming year.

**Sharpshooter Visit:** **Free (with EPR)**

By request, chapters can arrange a Sharpshooter visit through the Fraternity office. These are highly focused visits to give special attention and support to a certain area of fraternity operations by an expert alumnus.

**OTHER:** **TBD by Chapter/Colony**

Chapters have the ability to set their budget to provide for the various social, campus, philanthropic, scholastic, recruitment, and candidate education activities. Make sure to set a realistic budget that has some flexibility incase of any unforeseen expenses.

**\*\*\*\*All Figures are in United States Dollars**



# Expansion Plan

## **6-12 Months prior to colonization:**

- Develop Alumni Advisory Board and House Corporation
- Staff and alumni volunteers will identify, recruit, and train Board of 5-10 men.

## **3-6 Months prior to colonization**

- Pre-campus recruitment efforts begin.
- Efforts include
  - Mailers to alumni seeking legacies
  - Joint programming with the campus Hillel/Chabad
  - Participation in targeted college fairs
  - Advertisement in local Jewish newspapers

## **Initial Fall Semester/Quarter**

- Initial 7-10 day visit by staff members and/or Expansion Committee to follow up on prospects and identify new ones.
- Goal of initial visit is to form interest group of 10-20 members.
- Follow-up visit by staff and/or alumni volunteer for 5-7 days with the goal of colonizing group and electing officers.
- Monthly staff/volunteer visits for at least 12 months following colonization.

# Colony Timeline

## **0-3 months:**

- Elect a colony Council and key Chairman Positions.
- Hold weekly business and Council meetings.
- Organize and begin implementing a recruitment plan.
- Begin holding brotherhood activities and other colony activities that meet the Chapter Performance Standards categories.
- Create a budget.
- Continuously add members to the colony.

## **3-6 months:**

- Establish a functioning committee structure.
- Engage in campus activities and in IFC (where applicable).
- Demonstrate healthy growth beyond the initial group.
- Establishing a relationship with chapter or area alumni.

## **7-10 months:**

- Demonstrate financial stability by being current with the Fraternity HQ, having a sound budget, and filing monthly Exchequer reports.
- Develop a full, working calendar with activities that satisfy all the Chapter Performance Standards benchmarks.
- Continue to add members.

## **11-12 months**

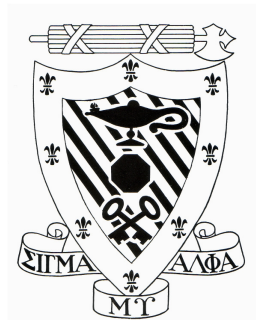
- Fulfill all of the Chapter Performance Standards.
- Petition the Octagon for Chapter status.

## *Chapter 2*

# Operations

“Thoroughness characterizes all successful men. Genius is the art of taking infinite pains. All great achievement has been characterized by extreme care, infinite painstaking, even to the minutest detail.”

Elbert Hubbard



# CHAPTER COUNCIL

1. Elected by members at large annually each academic year.
2. Consists of Prior, Vice Prior, Exchequer, Recorder.
3. Has a weekly Council meeting to discuss Chapter/Colony Activities, actions of members, concerns about the Chapter/Colony, strategic planning, university relations with the Chapter/Colony...etc, and Chapter/Colony progress.
4. The authoritative voice of the Chapter/Colony
5. Oversees all aspects of Chapter/Colony activities.

*See...*

*Council Agenda*

*Action plan forms*

*Minimum Expectations*

*Chapter Performance/ Standards*

The Chapter Council serves as the formal leadership of the Chapter /Colony, and guarantees short and long-term success. They ensure that all group activities follow regulations and policies set forth by the Council, the Fraternity, state, federal, and university regulations. The Council has the power to delegate authority to other responsible members of the chapter! The Chapter Council also keeps members motivated, constantly moving Sigma Alpha Mu forward!

Tips and Thoughts about Chapter Council:

Prior:

Vice Prior:

Exchequer:

Recorder:

## Qualities of a Successful Chapter Council

- Visionary
- Productive
- Courage
- Motivated
- Ambitious

# PRIOR

1. **Calls for a weekly meeting or has a meeting at the request from the Council.**
2. **Presides over all meetings and ceremonies.**
3. **Has the authority to request fraters to do that which may benefit the Chapter and the fraternity, pursuant to Blue Book.**
4. **Acts as the primary correspondent to SAM HQ**
5. **Represents Sigma Alpha Mu on IFC, or appoints a member at-large to attend IFC Meetings.**
6. **Is responsible for the welfare and actions of the Chapter, and its adherence to regulations put forth by the University, Fraternity, state and federal laws.**
7. **Signs all Chapter/Colony checks with the Exchequer.**

*See....*

*Parliamentary  
procedure  
reference on...*

The Prior is the primary formal leader in the Chapter/Colony. He is an innovator, mediator, leader and above all else, a role-model. The Prior position is the most visible and external; he projects how the Chapter/Colony is viewed by the public. When difficult situations occur; the Prior needs to learn how to work with other Council member to come up with the best resolution.

Tips and Thoughts about Prior:

## Qualities of a successful Prior

- “Big Picture” thinker
- Ability to keep others accountable
- Charismatic
- Strong Communication Skills
- Organized
- Patient
- Innovative

# VICE PRIOR

1. **Acts as Prior in his absence.**
2. **Runs the internal operations of the Chapter/Colony.**
3. **Assists the Prior in carrying out policies and measures.**
4. **Oversees all committee chairmen and runs the committee system.**
5. **Holds monthly committee meetings to organize and plan activities.**
6. **Meet with committee chairmen on a weekly basis.**
7. **Oversees Risk Management for the Chapter/Colony, and provides Risk Management education to members each semester.**

*See...*

*Committees*

*Risk Management,  
Risk Management-  
in-a-box, Risk  
Management Guide*

The Vice Prior's primary responsibility centers on organizing the Chapters infrastructure. He provides leadership in all phases of the Chapter/Colony operations, managing and supervising officers and committee chairman. He confirms members stay on-task and ensures the Chapter/Colony's activities are safe and successful. The Vice Prior must be organized and a strong leader to avoid chaos and dissention. The Vice Prior should be a motivational person and stay on task while juggling multiple activities.

Tips and Thoughts about Vice Prior:

## Qualities of a Successful Vice Prior

- **Organized**
- **Action Oriented**
- **Tracks Tasks**
- **Mediator**
- **Thinker**
- **Ability to delegate**

# EXCHEQUER

1. Administers the Chapter/Colony bank account(s).
2. Prepares a budget on an annual basis.
3. Maintains and updates all Chapter/Colony financial books and records.
4. Reports the Chapter/Colony balance, and has a break-down of each committee balance.
5. Makes financial books, records, and reports available to active fraters in good standing.
6. Prepares a financial report including balance sheet and distributes it to the chapter each semester.
7. Submits the monthly Exchequer Report to Fraternity Office.
8. Develops invoices for Chapter/Colony dues to be sent to all members and parents prior to the start of the semester.
9. Creates and collects dues contracts for each frater.
10. Files form 990 with the IRS.

*\* Collects dues from active members*

*See...  
Budget/Samples*

*(Include Copies of Reports)*

The Exchequer is the financial officer of the Chapter/Colony. He handles all monies coming in and going out of the Chapter/Colony bank account. The Chapter/Colony's financial stability depends on how well the Exchequer responsibly budgets, collects, and safeguards the Chapter/Colony's assets. This position requires organizational budgetary skills. Proficiency in the use of spreadsheets to budgetary software is helpful.

## Qualities of a Successful Exchequer

Tips and Thoughts about Exchequer:

- Financially responsible
- Detail Oriented
- Business Savvy
- Persistent
- Assertive

# RECORDER

1. **Records all meetings minutes, or appoint a member to do so while absent.**
2. **Maintains all Chapter/Colony rosters**
3. **Ensures each new member completes a candidate biography to forward to the Fraternity Office.**
4. **Submits all paper work for initiations according to the Blue Book standards.**
5. **Maintains and organizes chapter files.**
6. **Prepares the monthly Recorder's Report to forward to the Fraternity Office.**

*(Have Electronic Copies as well)*

*(Meeting Minutes, Chapter Correspondence)*

The Recorder is the Chapter/Colony's internal and external correspondent. The Recorder should handle Chapter/Colony correspondence promptly and efficiently, communicating in a courteous, clear, and concise manner. He keeps the Chapter/Colony's records: the member roster, meeting minutes, candidate biographies ...etc. Excellent written communication skills and the ability to stay organized are key aspects of the Recorder's duties.

Tips and Thoughts about Recorder:

## **Qualities of a successful recorder**

- **Organized**
- **Legible writer**
- **Note Taker**
- **Concise**
- **Detail oriented**



# Action Plan Form

## **Goal:**

(Qualified and Time Oriented Statement)

What are the Objectives (steps) which need to be completed to achieve the <u>Goal?</u>	How will each be accomplished?	What resources are needed? (Time, money materials)	Who will complete each Objective?   Date?
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5
6	6	6	6
7	7	7	7
8	8	8	8
9	9	9	9
10	10	10	10
11	11	11	11
12	12	12	12

# Sample Activities for a Semester

## **Week One**

Chapter/Colony Meeting-Committee Selection  
Chapter Council Meeting-Committee appointments  
Recruitment Training-Led by Prior  
Brotherhood Activity-Basketball at Recreation Center  
Hillel Activity-Welcome back BBQ

## **Week Two**

Chapter Meeting-Recruitment Ideas  
Council Meeting-Choose Best Recruitment Ideas  
Recruitment Planning Meeting-Plan Activities, Dates...etc  
Recruitment Follow-up

## **Week Three**

Chapter Meeting  
Council Meeting  
Rush Activities  
    1. Meet the Brothers/Pizza  
    2. Bowling Night with Prospects  
    3. Bid Day BBQ

## **Week Four**

Chapter Meeting-Rush Evaluation  
Council Meeting-Plan Year-Round -Recruitment  
Brotherhood Activity-MLB Baseball Game

## **Week Five**

Chapter Meeting-Plan Social  
Council Meeting-Pick Possibly Sororities for Social  
Vice Prior Committee Meeting- Organize Month

### **Week Six**

Chapter Meeting-Candidate Education  
Council Meeting-Evaluate Candidates  
Social-Pool Party with Sigma Delta Tau

### **Week Seven**

Chapter Meeting-Homecoming Planning  
Council Meeting-Homecoming Planning

### **Week Eight**

Chapter Meeting-Homecoming Activities  
Council Meeting-Supervise HC Activities  
Social-Paired Greek Organizations

### **Week Nine**

Chapter Meeting-Discuss Activities/CDL  
Council Meeting-Decide who is going to CDL  
Chapter Leadership Day-October

### **Week Ten**

Chapter Meeting-Spring Planning  
Council Meeting-Spring Planning  
Brotherhood Activity-University Hockey Game  
Recruitment Activity-Bowling

### **Week Eleven**

Chapter Meeting-Chapter Values  
Council Meeting-Which Values to Stress  
Brotherhood-University Football tailgate/game

### **Week Twelve**

Vice Prior Committee Meeting  
Chapter Meeting-  
Council Meeting-

### **Week Thirteen**

Chapter Meeting-  
Council Meeting-

### **Week Fourteen**

\*\*Nominations for Chapter Council  
Chapter Meeting-  
Council Meeting-

### **Week Fifteen**

\*\*Officer Elections  
Brotherhood Activity-Turkey Dinner  
Chapter Meeting-  
Council Meeting-  
End of Semester Formal- Great Dance Hall

# Sample Meeting Agenda

- 1) Call meeting to order
- 2) Creed
- 3) Attendance
- 4) Read Minutes from last meeting
- 5) Officer Reports
  - a) Recorder
    - (1) Chapter Performance Report
    - (2) Bowling Team
  - b) Exchequer
    - (1) Balance
    - (2) Budget/Expense Reports
    - (3) Committee Budgets
  - c) Vice Prior
    - (1) Committee Reports
      - (a) Philanthropy
        - (i) Budget Planning
      - (b) Brotherhood
      - (c) Recruitment
      - (d) Scholarship
      - (e) Social
      - (f) Hillel/Chabad
      - (g) IFC Rep
      - (h) Candidate Education
        - (i) Review "Week 2" Material
        - (ii) Test
      - (i) Finance
  - d) Prior
    - (1) National Rep Coming
    - (2) Community Service!
    - (3) Elections
    - (4) GRADES
- 6) Old Business
  - a) Request Forms
  - b) Coke Grant
- 7) New Business
  - a) Wish List
- 8) Good and Welfare
- 9) Adjourn Meeting
- 10) Fast and Firm

# Goal Setting – Workshop Exercise

**Q1.** List 5 things you have already accomplished that you are proud of.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Q2.** What do you want your chapter/colony to accomplish in the next ten years? List 25 items; write as fast as you can, let your mind run free, this is what you want!

- |           |           |
|-----------|-----------|
| 1. _____  | 17. _____ |
| 2. _____  | 18. _____ |
| 3. _____  | 19. _____ |
| 4. _____  | 20. _____ |
| 5. _____  | 21. _____ |
| 6. _____  | 22. _____ |
| 7. _____  | 23. _____ |
| 8. _____  | 24. _____ |
| 9. _____  | 25. _____ |
| 10. _____ |           |
| 11. _____ |           |
| 12. _____ |           |
| 13. _____ |           |
| 14. _____ |           |
| 15. _____ |           |

16. \_\_\_\_\_

**Q3.** Now pick your four most important 1 year goals for the chapter. Then write down why they are important to you, why they are important for the chapter.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_

**Q4.** Now pick your four most important 3 year goals for the chapter. Then write down why they are important to you, why they are important for the chapter.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_

**Q5.** Now pick your three most important 5 year goals. Then write down why they are important to you, why they are important for the chapter.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

**Q6.** Now pick your four most important 5 year goals. Then write down why they are important to you, why they are important for the chapter.

**Q7.** Count how many 1yr. \_\_\_\_ 3yr. \_\_\_\_ 5yr. \_\_\_\_ 10yr \_\_\_\_ goals you have for the chapter.

**Q8.** What person must I become to accomplish my list of goals? What actions must I take to reach my chapter goals?



# **FAQ about the Standards Board**

## **What is a Standards Board?**

- The Standards Board is an accountability device designed to implement and enforce a Chapter/Colony code of conduct.
- The Standards Board functions as the judicial branch of your Chapter/Colony, and hears cases brought before it.

## **What type of cases should be brought before the Standards Board?**

- Poor Judgment in a social setting
- Violation of Fraternity rules
- Financial delinquency
- Hazing
- Destruction/Vandalism of property
- Possession, under the influence, or use of illegal substances on Fraternity property
- Fighting
- Other issues determined by your Chapter/Colony Code of Conduct

## **Who should serve on the Standards Board?**

- A neutral member should hold the head position of the Board.
- He shall be joined by two other respectable members at-large, as well as a non-voting recorder to take notes of the proceedings.
- No member of the Chapter Council should serve on the Board.

## **Why does your Chapter/Colony need a Standards Board?**

- A Standards Board helps divert pressure off of the Chapter Council. The Board is designed to resolve issues peer-to-peer. It attempts to minimize squabbles between brothers and promote a united brotherhood.

# **Chapter Performance Standards (CPS)**

- **The CPS is an accreditation program, passed by the 1997 Convention body.**
- **CPS determines whether or not a chapter meets the standards at a high enough level to maintain active status as a recognized Sigma Alpha Mu chapter.**
- **Chapters that do not meet the standards are placed in Alumni Receivership, a probationary status in which the group has one year to improve through working with Advisory Board, Regional Governor and staff.**
- **Chapters are evaluated based upon 12 criteria.**
- **The most heavily weighted criteria are, in order: 1) Scholarship (18%); 2) Recruitment (15%); and 3) Risk Management (12%).**
- **Chapters should use the CPS in order to plan out a successful calendar and Chapter program for the year.**
- **Chapters should continuously fill out the Chapter Performance Report, based upon the CPS, throughout the year.**

## **CHAPTER PERFORMANCE STANDARDS**

### **SIGMA ALPHA MU FRATERNITY**

#### **RECRUITMENT (15%)**

Chapter's primary focus in *recruitment* is on the educational benefits of fraternity, with emphasis on the life-long benefits of membership.

Each chapter member contributes his "fair share" of time and effort to the *recruitment* program.

The chapter gives special consideration to legacies *as described in Division D. Article III Section 3 Letter a. of the Blue Book.*

Every alumni rush recommendation is acknowledged properly and followed up on promptly.

The chapter has pledged a sufficient number of men to ensure a chapter membership of at least 40 fratres, increasing chapter size by 10% each year until the chapter size meets or exceeds that of the 3 largest fraternities on campus.

The chapter takes a candidate class each semester/quarter allowable by University policy.

The chapter plans and provides at least one *recruitment* seminar for its members and candidates each semester/quarter.

Recruitment Chairmen are appointed to annual terms.

#### **CANDIDATE EDUCATION (7%)**

The chapter follows the Model Candidate Education Program in its entirety, and every fratre demonstrates honorable behavior in influencing candidates towards chapter membership.

Each candidate is provided in-depth instruction on the fraternity's creed and traditions.

Each candidate is provided in-depth instruction on all areas of fraternity and chapter operation.

Each candidate attends the semesterly/quarterly risk education program, sponsored by the chapter.

All chapter members are committed to upholding the spirit and adhering to the laws prohibiting hazing in any form.

The candidate program is designed not only to improve the academic average of each candidate, but to ensure that the candidate class average exceeds that of other fraternity candidate groups on campus.

The candidate education period is completed within 8 weeks.

The chapter ensures that each candidate can pay his initiation fee prior to the initiation ceremony.

Candidates will complete the AlcoholEdu program within five weeks of affiliation.

### **ALUMNI RELATIONS (5%)**

The chapter has conducted a well-planned alumni program, designed around alumni reunions, chapter anniversaries, and alumni involvement such as: advising, house corporation membership, etc.

The chapter membership extends a proper welcome to visiting alumni; including chapter advisors,

regional governors, consuls of the Octagon and Fraternity Office staff.

The chapter publishes at least one alumni newsletter each semester/quarter.

The chapter officers respond promptly to all alumni communication.

The chapter provides articles for the Octagonian.

The chapter regularly assists the Office in updating alumni addresses.

The chapter has an active Alumni Advisory Board with which it works closely and harmoniously.

### **FINANCES (7%)**

The chapter operates with a realistic budget, approved by the chapter and Alumni Advisory Board. A copy of the budget needs to be filed with the Fraternity Office.

The chapter operates with at least a 5% profit over expense.

The chapter traditionally meets all financial obligations to every vendor and creditor within 30 days of the invoice due date, including the Fraternity.

The chapter is managing accounts receivable in a timely fashion.

The chapter regularly contributes to a chapter *brick fund*.

## **CHAPTER HOUSE (5%) (IF HOUSED)**

The house has a tradition of being maintained in a clean, safe, and orderly condition at all times.

There is an emergency evacuation plan in place and posted throughout the house.

Each member contributes his "fair share" in the overall effort to clean and maintain and improve the house.

The chapter has an annual plan for house improvement (in cooperation with the house corp.) and shows accomplishment in the improvement.

The chapter has a house fund into which each member makes contributions; the fund would not be used for routine house functions such as paying rent or insurance, but for special needs

such as to purchase housing, make improvements, purchase furnishings, major repairs or renovations, etc.

Chapters that do not have a "house", should maintain a brick fund. These chapters should also strive to organize group apartment living for fratres.

## **SOCIAL PROGRAM (5%)**

The chapter's social program is designed to enhance Sigma Alpha Mu's campus reputation for social maturity and responsibility.

The chapter provides a balanced social life by sponsoring a variety of functions--coed, ***membership development***, faculty and administrators, non- alcoholic, etc.

The chapter places no special emphasis on the consumption of alcohol, and provides at least equal access to non-alcoholic beverages at all social functions where alcohol may be ***present***.

The chapter upholds the spirit, policies, and laws of the institution, state, and fraternity in the conduct of chapter social functions, and in the possession and consumption of alcohol, drugs, etc.

## **SCHOLARSHIP (18%)**

The scholarship program is designed to regularly recognize fratres and candidates who achieve academic distinction.

The chapter provides appropriate counseling for each candidate and fratre needing academic assistance.

The chapter maintains a productive learning environment for chapter members.

The chapter not only exceeds the all-men's, the all-university, and the all-Greek average in scholarship, but has rank not less than among the top third of all fraternities.

The chapter has a graduation rate above the campus average.

Each semester, the chapter invites a University professor or academic counselor to speak about study skills, academics, graduate school, etc., at a chapter meeting.

Each candidate affiliated shall have a minimum college/university GPA of 2.25 or a GPA at or above the campus all-men's average. Candidates affiliated that do not have a college/university GPA must have a minimum high school GPA of 2.3

## **CHAPTER ORGANIZATION AND LEADERSHIP (7%)**

The chapter conducts a goal-setting retreat at the beginning of each administration, which includes an annual self-assessment.

No fewer than 95% of the undergraduate fratres participate in chapter meetings and activities over the course of the year, with the exception of those fratres who work or have classes during events.

At least 80% of the **membership** is active in chapter committees, in officer positions, with program leadership, and/or in IFC, college, and/or community activities.

The chapter has specific committee chairmen *as described in the Blue Book and Key*.

Chapter meetings begin with the Creed and end with Fast and Firm.

Fratres show dignity and respect for each other and for the fraternity not only at chapter meetings, but at all times.

The chapter has been represented at all regional conclaves and at Leadership Conference/Convention. At least one member of the **chapter** council attends Leadership Conference/Convention.

The chapter officers remain in close communication with the Fraternity Office, file all Exchequer and Recorder reports in a timely manner, and respond to other surveys or requests for information, promptly.

Each chapter officer is fully familiar with the duties and responsibilities of his office *as described in the Blue Book and Key*.

In conjunction with the Chapter Advisor, Alumni Advisory Board, House Corp., Regional Governor, and Fraternity Office, the chapter has developed a "three year plan of action" which is updated annually at a special strategic planning retreat/workshop.

### **CAMPUS LEADERSHIP/INTERFRATERNITY ACTIVITIES (7%)**

Chapter members have been elected and/or appointed to top campus leadership positions both among the student body and within the Greek community.

The chapter fully participates in interfraternity activities (Greek Week, Greek Sing, etc.) and joint philanthropy efforts.

### **COMMUNITY SERVICE (7%)**

The chapter conducts at least two community service projects annually--one for the Alzheimer's Association and one for a local organization or philanthropy--with at least 95% of the *membership* participating in each.

### **RISK REDUCTION (12%)**

The chapter must uphold and abide by all of the rules and governance which are covered in the Blue Book, Risk Management Policy, or other fraternity policy.

The chapter has an active Risk Manager, with duties outlined in the Risk Manager's Manual.

The chapter plans and provides at least one risk management education program for its members and candidates each semester/quarter, as part of an on-going education program.

## **GENERAL CHAPTER RELATIONS (5%)**

The chapter, *has* not been in alumni receivership, is not on probation with either the University or the fraternity, and is in overall good standing.

The chapter is in compliance with and participates in the proper initiation procedure and ritual.

The chapter has communication/programming for the parents of members.

The chapter submits all reports, in a timely fashion, to the Fraternity Office. Additionally, the chapter maintains ongoing communications with the Fraternity Office and alumni officers.

## **CHAPTER PERFORMANCE STANDARDS**

### **SIGMA ALPHA MU FRATERNITY IMPLEMENTATION**

#### **PROGRAM GOALS**

- \* To help increase a chapter's health by providing them with basic standards to meet, and proactively set goals for improvement
- \* To set an ultimate goal of excellence for each chapter to reach--"Founders Chapter" status
- \* To provide a better program from which chapter awards will be judged

#### **OUTCOMES**

Chapters will be placed in one of three groups, based on their total points:

- 1.) 90+ Founders Level. Groups attaining this level of excellence are our healthiest.
- 2.) 70-89 Octagon Level. These groups are at an acceptable level in order to remain an active chapter in Sigma Alpha Mu.
- 3.) Below 70 Alumni Receivership. A probationary status--Chapters will have a year to bring their ranking up to the Founders or Octagon Level. Alumni Receivership means the chapter's alumni will receive specific charter and be expected to work, along with staff, Regional Governor, and the Octagon, with the chapter to increase its standing.

If, after a year, the chapter cannot move beyond Alumni Receivership, the Octagon will have the option to reorganize, suspend, or close the chapter.



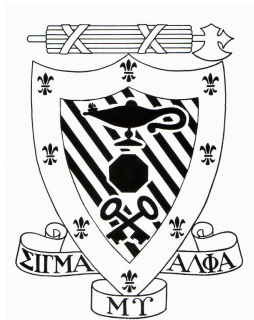
## *Chapter 3*

### **Finances**

**“Uno sciocco e il suo denaro son  
presto separati;**

**English Equivalent: A fool and his  
money are soon parted.”**

Italian Proverb



# How to Open a Fraternity Checking Account

## *Step One*

- ✓ Contact the local Internal Revenue Office to apply for an Employer's Identification Number (*EIN*).
- ✓ Ask for an SS-4 Form.
- ✓ Fill it out and return it to the IRS.
- ✓ When you have received your *EIN*, contact the Fraternity Office (317-846-0600) to place this number on file for future use.

-Re-colonized groups should call the Fraternity Office, first, to see if there already is an EIN on file.

## *Step Two*

- ✓ Obtain your *EIN*.
- ✓ Call the Fraternity Office.
- ✓ Request a letter from the office giving permission to open a checking/savings account. This letter is usually required by most banks.

## *Step Three*

- ✓ EIN and the permission letter.
- ✓ Go to your bank to open a checking and/or savings account.
- ✓ The account should be "Sigma Alpha Mu Fraternity- XXXXX Colony".
- ✓ Ask for two signatures to be required to issue a check from local **ΣAM** colony.

***NOTE: For Canadian groups, contact your Canadian equivalent to obtain the steps to secure any revenue number you may need to open an account***

# Simple Outline: How to Set up A Fraternity Budget

A budget can be set up in no time at all, and it is a simple process. It just involves thinking where to assign cost and what to do for the future. A few steps are all it takes to set-up your fraternity budget!

**\*\*The Exchequer should not decide alone what the money is to be spent on, after all, everyone is putting in their fair share.**

## **1) Have a Meeting**

### **a) Who Should Attend?**

- i) All members and candidates
- ii) Chapter Advisor if available

### **b) Planning**

- i) International Fraternity Obligations
  - (1)Membership Fees
  - (2)Insurance
  - (3)Educational Program Pre-Registration

### **c) Allocating Costs to Committees**

- i) Committees most chapters allocate money towards
  - (1)Brotherhood
  - (2)Recruitment/Rush
  - (3)Philanthropy/Community Services
  - (4)Athletics/Intramurals
  - (5)Scholarship/Academics
  - (6)Social (Homecoming & Greek Events)
  - (7)Alumni

### **d) Dues**

- i) Set dues
  - (1)They can range from several hundred dollars to several thousand dollars per semester.
  - (2)Dues should be reflective of the chapter/colony's planned activities, so members see the worth and measuring in  $\Sigma$ AM Membership

## **2) ORGANIZING A BUDGET**

- a) Use a specialized accounting system for keeping track of finances
  - i) QuickBooks
  - ii) Peach Tree
  - iii) Excel
- b) Maintain precision and accuracy

## **3) Responsibility with Chapter/Colony Funds**

- a) Committee Allowance
  - i) The Exchequer manages the money for committees.
  - ii) Make sure committees are aware of the amount allocated with the budget.
- b) Activities
  - i) Balance activities
    - (1) Members desire fiscal responsibility
    - (2) Use Chapter/Colony funds for appropriate Chapter/Colony activities

## **4) Celebrate!**

- a) It's up to the Chapter/Colony to stay within the limits of the budget and adhere to it.
- b) Funds drive fraternity activities, and with regulations, many successful activities can occur.

Expenses	
Budget Item Description	Budget Item Calculation Total
SAM Expenses	
Dues are \$78 per man per year	
pass through charge	SAM dues total # of members 8 = X \$78 624
Chapter can control cost	
billed by James R. Favor	SAM insurance invoice = Chapter 1280
Due 3 weeks before ceremony	
pass through charge	SAM initiation fees # of initiates 0 X \$285 = 0
Discounted rate for attendance	
at LC, CLD, etc	Educate. Program Pre-reg. Chapter invoice = 750
TOTAL 2654	
Facility Expenses	
Rent for facility, including university suite, if applicable	Rent # living in # living out
R & M for owned and leased properties, review lease	Repair & maintenance
Cost of large, usually permanent improvements on facility	Capital assets
Water, electric, gas, cable telephone	Utilities
Be sure to include all food items, including supplies	Food
Wages for cook and/or any chapter employee	Cook/Maintenance salary
Any chapter employees may be subject to payroll taxes	Payroll taxes Based on total payroll, check with State or accountant
Chapter Expenses	
Include all expenses, meals	
admissions, entertainment	Recruitment 300
Activities planned for the chapter as a whole	Brotherhood activities 250

Improve program and offer chapter scholarship	Academic/Scholarship	25
Meet with RM, improve environment, get speaker	Risk management	50
Reunions, meals, activities mailings, newsletters	Alumni	100
Save funds for new facility and repairs to existing	Building fund	150
Intramural & intrafraternity sports & activities	Athletics	200
1 CS for Alzheimer's Assoc. & 1 of chapter's choice	Community service	700
All social activities not included elsewhere, formals, sorority and fraternity activities		500
	Social activity	
		<b>TOTAL</b>
		<b>2250</b>
	Social activity	
	Social activity	
	Social activity	
	Social activity	

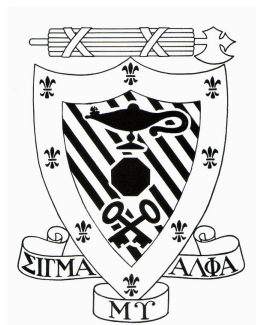
Social activity			
Uncollectible billings to chapter members	Bad debt	10%	560.4
Chapter supplies for general use	Misc supplies & materials		
<b>Campus Activities</b>			
Expenses for Greek Week, Greek Games, etc.	Greek Week		100
Homecoming expenses parade floats, alumni	Homecoming		100
For other chapter's community service projects	Contributions to CS projects		500
Chapter membership fees to social orgs, for example, Hillel	Membership fees for social orgs		
<b>Other Expenses</b>			
Any programs or expenses not included above			
	Other		
	Other		
	Other		
	Other		
	Other		
<b>Total Expenses</b>			<b>6164.40</b>

# *Chapter 4*

## **Membership Education**

“The most valuable of all education is the ability to make yourself do the thing you have to do, when it has to be done, whether you like it or not.”

Aldous Huxley





# SIGMA ALPHA MU – 4 WEEK PROGRAM

## CANDIDATE SYLLABUS

	Candidate Educator (CE)	Assistant CE	Big Brother Coordinators
Name:			
Phone:			
E-mail:			
AIM Name:			

### Welcome!

If you are reading this syllabus, it means that you have been invited to learn and partake in Sigma Alpha Mu fraternity. Congratulations on this significant accomplishment. Sigma Alpha Mu does not recruit based on the same principles and ideas as many other organizations. Before you were offered a bid, be sure that much discussion and planning was had. Only when the chapter decided that you possessed the desired character, attitude and potential were you offered the chance to become a candidate. While this is a great start, the candidacy marks only the beginning of the process. The following training period will aim to educate and prepare you for active duty in the fraternity. It is the chapter's hope that you will one day be a leader in the fraternity. Best of luck to you!

### Learning Objectives

The goal of the candidate-training program is to educate and develop potential members about the foundation and operations of both Sigma Alpha Mu and the surrounding Greek system. Through this process, the candidate will become familiar with numerous aspects of the fraternity. The program will cover:

- Fraternity history
- Fraternity traditions and rituals
- Fraternity structure
- Social responsibilities
- Leadership
- Etc.

### Training Materials

Each candidate will receive Sigma Alpha Mu's Candidate Handbook (the Purple Book) as well as a Candidate folder. Numerous handouts will also be given throughout the training period. Candidates are expected to supply their own notebook and writing utensil, which they are expected to bring to each meeting along with their Purple Book, calendar of events (to be provided) and any other additional resources the Candidate Educator says will be required.

### Training Structure

The training will consist of a four weekly meetings. Here the candidates will meet with the CE in order to discuss, learn, and be tested on fraternity training material. Attendance to these meeting is mandatory. Should a conflict arise, it is the candidate's responsibility to make necessary accommodations **prior** to the meeting.

The training will be done utilizing a number of strategic tools. Every week the candidates will be given short assignments. The assignments will consist of memorizing fraternity information, doing active member interviews and written testimony. Details about these assignments will be given at meeting. It is expected that all assignments be finished by the following meeting unless otherwise specified by the CE. Obviously, the candidates must also keep up in their University coursework which is why the fraternity assignments are design to only take up 2-3 hours per week.

Furthermore, it is believed that a great deal of knowledge can be absorbed through mere observation and participation; this is why all the candidates are encouraged to spend as much time at the chapter events as possible. Not only will it give the candidates a better picture of the organization, but also better acquaint them with the active members of the fraternity.

## Candidate Initiation

Candidate initiation will be based on ability to meet the Minimum Candidate Standards, participation in fraternal activities, and general rapport with members and candidate class members.

"The crest and crowning of all good, life's final star, is Brotherhood."  
-- Edwin Markham

## Schedule of Meeting and Assignments

Meeting 1	Responsibilities of Membership
Guest Speaker(s)	Chapter Council
Activities	<ul style="list-style-type: none"> <li>• Introductions</li> <li>• Handout Materials: Purple Books Risk Management Policy Candidate Syllabus Calendar of events</li> <li>• Receive from Candidates: Class schedules Class syllabi</li> <li>• Discussion on: Candidate Education Responsibilities of Membership Minimum Candidate Standards New terms Big Brother Program Interviews</li> </ul>
Other Business	<ul style="list-style-type: none"> <li>• Sign/Fill out: Bios Address envelopes to parents Blue Card Candidate/Active Contract</li> <li>• Appoint Candidates into appropriate chapter committees</li> <li>• Big Brother selection/discussion</li> <li>• Position Description Manual</li> </ul>
Assignments (due following week)	<ul style="list-style-type: none"> <li>• Read pages 1-8, 48</li> <li>• Class schedule</li> <li>• Interview Big Brother</li> <li>• Interview position equivalent among active members</li> <li>• Learn the Greek Alphabet and Founding Fathers</li> <li>• Rush Evaluation Form</li> <li>• Written Assignment</li> </ul>
Interview Track	<ul style="list-style-type: none"> <li>• 0 - 4 completed</li> </ul>

Meeting 2	Chapter Operations
Guest Speaker(s)	Chapter Vice Prior and/or Rush Chair
Activities	<ul style="list-style-type: none"> <li>• Quiz 1</li> <li>• Handout Materials: Position Flow Chart</li> <li>• Receive from Candidates: Assignments from week 2</li> <li>• Discussion on: Position structure of Chapter Current member status Elections/Pin points Importance of Rush</li> </ul>
Other Business	<ul style="list-style-type: none"> <li>• Last week's homework</li> <li>• Review Quiz 1</li> <li>• Chapter Scrapbook</li> <li>• Planning of Rush Event</li> </ul>
Assignments (due)	<ul style="list-style-type: none"> <li>• Read pages 9-19</li> </ul>

	<ul style="list-style-type: none"> <li>• Interviews</li> <li>• Meet w/ Chapter positions concerning Rush</li> <li>• Write bullet-form of Position Description Manual</li> <li>• Learn founding dates</li> <li>• Learn Creed</li> </ul>
<b>Interview Track</b>	<ul style="list-style-type: none"> <li>• 4 - 8 completed</li> </ul>

<b>Meeting 3</b>	<b>The International Fraternity &amp; Local Chapter</b>
<b>Guest Speaker(s)</b>	Chapter Alumni
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Quiz 2 (modified from 2 &amp; 3 in MCEP)</li> <li>• Handout Materials: List of Chapter achievements and awards Chapter constitution and by-laws Services from the Fraternity Office Latest Octagonian</li> <li>• Receive from Candidates: Assignments from week 1</li> <li>• Discussion on: Local Chapter history House and its maintenance Volunteer opportunities Interfraternity Council</li> </ul>
<b>Other Business</b>	<ul style="list-style-type: none"> <li>• Last week's homework</li> <li>• Review Quiz 2</li> </ul>
<b>Assignments (due)</b>	<ul style="list-style-type: none"> <li>• Read pages 19-26</li> <li>• Interviews</li> <li>• Learn Fast &amp; Firm</li> <li>• Position Description-paragraph form</li> </ul>
<b>Interview Track</b>	<ul style="list-style-type: none"> <li>• 8 - 12 completed</li> </ul>

<b>Meeting 4</b>	<b>Leadership and Service</b>
<b>Guest Speaker(s)</b>	Sorority President / Panhellenic Officer
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Quiz 4</li> <li>• Handout Materials: Case Studies</li> <li>• Receive from Candidates: Assignments from week 4</li> <li>• Discussion on: Problems people face in a Fraternity Importance of Philanthropy Social Conduct Greek Community / Social Perception Death of A Fraternity Reading &amp; Discussion</li> </ul>
<b>Other Business</b>	<ul style="list-style-type: none"> <li>• Last week's homework</li> <li>• Review Quiz 4</li> </ul>
<b>Assignments (due)</b>	<ul style="list-style-type: none"> <li>• Read pages 39-47</li> <li>• Interviews</li> <li>• Learn Girl of SAM</li> <li>• Position Description-Advice &amp; Improvements Needed</li> </ul>
<b>Interview Track</b>	<ul style="list-style-type: none"> <li>• 12 - 18 completed</li> </ul>

To prepare for the initiation ceremony of Sigma Alpha Mu, please refer to the Model Candidate Education Program, Ritual Kit, and Black Book. Actives and Candidates will be dressed in formal attire for the ceremony.

# Sigma Alpha Mu Foundation

The Sigma Alpha Mu Foundation has served as the charitable and educational arm of Sigma Alpha Mu since it was chartered in 1944. The Foundation is a dynamic example of Sigma Alpha Mu's ideals in action. Each scholarship is made possible by endowments made by alumni and friends of the Fraternity. In addition to scholarship grants, the Sigma Alpha Mu Foundation funds educational programs supporting leadership, scholarship, good citizenship, personal development and professional development. For more information visit (<http://www.sam.org/foundation.asp>)

## Young Scholarships Program

All Sigma Alpha Mu candidates that achieved a 3.75/4.0 G.P.A. (or equivalent), for courses taken during their candidacy, will be recognized as a Sigma Alpha Mu Foundation's Young Scholars Program. Young Scholars will receive recognition and a Foundation check in the amount of \$200.

## Top Scholars Awards

**Senior Scholarship Award (\$1,000):** The Hyman I. Jacobson Award is presented annually in memory of one of our Founders to the top senior scholar in the Fraternity

**Junior Scholarship Award (\$250):** This award is made annually to the top junior scholar in the Fraternity. The applicant must be a junior in an undergraduate program and have been a frater for at least one year.

## Sigma Alpha Mu Scholarships

In the spring of each year Sigma Alpha Mu announces its Foundation Scholarship winners. Over 100,000 dollars is awarded annually.

### Scholarships are based on:

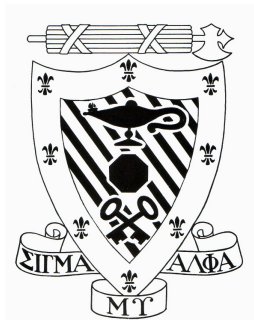
- **Academics**
- **Financial Need**
- **Service to Chapter**
- **Merit**
- **Service to Community**
- **Good Citizenship**
- **Leadership**
- **Religious Endeavors**

# *Chapter 5*

## **Alumni**

“Gratitude preserves old friendships, and  
procures new.”

Anonymous



# Developing and Maintaining Relationships

To be a healthy chapter it is critical to enlist the support of many different individuals and organizations. One of the greatest such support groups is the local Fraternity Alumni. These are individuals that have rich experiences and as a result are valuable tools in maintaining and creating a healthy Chapter. In order to secure the support and benefit of these alumni it is important to involve them in a variety of different Chapter activities. While it is not critical to involve the Alumni in every Chapter activity, the following lists a recommended number of times of Alumni involvement, examples of Alumni inclusive events, Alumni specific events, and other highly recommended Alumni specific services. Each Chapter should maintain an updated and descriptive list of local Alumni and contact information.

## **A Brief Introduction**

### **What is the Alumni Advisory Board?**

The Blue Book states that each chapter shall have an Alumni Advisory Board consisting of three to seven fraters. Each chapter advisor in the Alumni Advisory Board shall be directly responsible to the Regional Governor. The Blue Book defines the Chapter Advisor as the Chairman of the Alumni Advisory Board. He is appointed by the Chapter, with the consent of the Octagon. The Chapter Advisor has the power to enforce the laws of the Fraternity, recommend the suspensions or expulsions of fraters, and render periodic reports to the Octagon and Regional Governor as requested.

### **The purpose of the Alumni Advisory Board:**

- advise and help to improve the operations of the chapter or colony through the promotion of the ideals and principles of the Fraternity, and develop and strengthen the fraternal experience for all involved.
- to work with the chapter officers, committees and members to enhance the day to day operations and programs of the chapter.

# Alumni Activities

## Alumni Specific Activities

These should be held at minimum two times per semester. These activities are designed with the alumni in mind, and have as their purpose to create a stronger and closer relationship between the Chapter and the Alumni. An example of these types of activities includes, but is definitely not limited to:

- |                                       |                                |
|---------------------------------------|--------------------------------|
| A) Going to a sporting event          | F) Fishing trip                |
| B) Playing sports                     | G) Watching a movie/sports/etc |
| C) Dinner                             | H) Golfing trip                |
| D) Barbecue                           | I) Board Games                 |
| E) Showing them around the University | J) Museum/Concert              |

## Alumni Inclusive Activities

These should be held numerous times per semester. These are activities that the Alumni should be aware of, and their attendance at these activities is entirely optional. All alumni do not need to attend events like these; these events should be available for individual alumni to attend at their own discretion. Examples of these types of activities include, but are definitely not limited to:

- |                         |                          |
|-------------------------|--------------------------|
| A) Fraternity meetings  | D) Homecoming            |
| B) Philanthropic events | E) Initiation Ceremonies |
| C) Greek Week           |                          |

## Alumni Services

Different Chapters have done different things to keep their Alumni informed and updated. The closer Alumni feel to the Chapter, the more time, effort, money, they will donate; and it makes a significant difference. The following are some services that have worked successfully for other Chapters. Feel free to create a different service. It is highly recommended that at least one service be done.

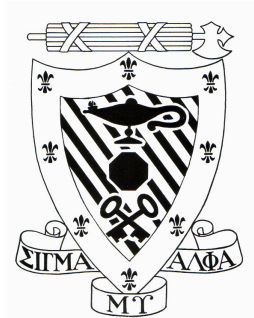
- A) Newsletter: Sent out twice per semester. This can be as short as one page.
- B) Email: Sent out once monthly.
- C) Phone Calls: On an ongoing basis with Advisory Board, and as needed with Alumni at large.

# *Chapter 6*

## *Installation Guide*

“We shall neither fail nor falter; we shall not weaken or tire...gives us the tools and we will finish the job.”

Winston Churchill





# **The Final Phase: from Colony to Chapter**

## **1)Petition to the Octagon**

- a) Write a letter of intent to the Octagon members, stating why you should become a chapter.
- i) This should be accomplished within a year of your group becoming a chapter.

## **2)Reserve Space**

- a) Greek housing, Hillel, Chabad, or student unions.

## **3)Plan Banquet/Festivities**

- a) Shop around for the best deals and prices.
- b) Plan according to size of your banquet.

## **4)Contact Local Area Alumni & Family Members**

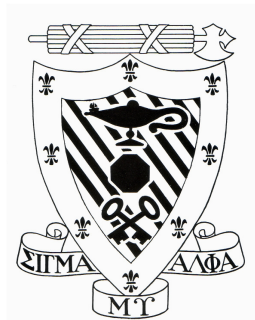
- a) Attain a list of local area alumni from the Fraternity Office.
- b) Inform family members of upcoming events and have them book travel arrangements if necessary.
- c) Send out an informational letter to local area Alumni, and family members, stating when you're chartering and any other information they need.

# *Chapter 7*

## *Recruitment*

“We see recruitment as one of the key factors. And getting the best players in is crucial.”

Gary Issott



# Recruitment Tracking Grid

This is a clear and visual resource designed to aid your Chapter in tracking the progress of individuals in the Chapter. Once an active has met a “potential” member they should place a check or an ‘X’ where their column and row intersects.

(Example)

	Active's Initials	James Gold	David Brote	Alex Gluben	Adam Ruthen
Frank Rotherstein	JG	X	X	X	
Micheal Hosberg	JG	X			
Michael Finestein	DB		X		
Phil Wolfenson	AG	X	X		
Marcus Levine	AER	X	X	X	
Ryan Keyserberg	AER	X		X	
Eddy Horne	AG				X

## **How it helps track recruitment guests:**

From this grid your chapter will be able to easily assess where they stand in the recruitment process with respect to their Wish List. The example above illustrates that the Chapter should be having discussions about Frank, Phil, and Marcus since a good number of individuals have already met them. It also shows an effort has not been made to meet with Adam R, or that he has been unavailable.

## **How it keeps all actives involved:**

With little effort, one can easily see the effort that has been made by members to meet with individuals on the Wish List. For example, Dave has been doing a good job as he has met with over half of the Wish List. Adam on the other hand, has only met one person. Your chapter should establish positive and negative incentives to maintain a successful year-round recruitment process.

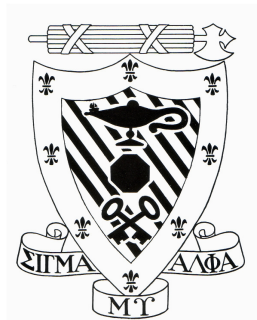
	Actives Initials	Active	Active	Active	Active	Active	Active	Active	Active
Prospects									
Prospects									
Prospects									
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Prospects									

# *Chapter 8*

## *Fraternity Policy*

“The severest justice may not always be the best policy”

Abraham Lincoln



# Sample Chapter Bylaws of Sigma Alpha Mu Fraternity

Division A: Name and Purpose

## *Article 1*

The name of this social fraternity shall be: Sigma Alpha Mu - Kappa Chapter.

## *Article 2*

The purpose of these bylaws is to govern the affairs of Kappa Chapter in accordance with the rules of the Blue Book, and to provide regulations for the proper functioning of the Kappa Chapter.

## *Article 3*

In event of conflict between these by-laws and the Blue Book, the Blue Book shall stand supreme.

Division B: Membership

## *Article 1*

The following are terms for these bylaws will be defined as the following:

*Mandatory* - Any event or meeting that can result in a fine and must be attended by all members

*Members* - Candidates and Actives

*Bad Standing* - (as defined by the Blue Book)

1) Member loses speaking rights during formal meeting

2) Member can not attend social functions

*Active* - A member that has gone through Initiation.

*Candidate* - A member that has or is going through candidate education.

*Fine* - A stipulated amount of money.

*Dues* - A stipulated amount of money owed each semester by every member. Dues are part of the social aspect of the fraternity.

*Full-time student* - A student who is taking no less than 12 semester credits

*Committee* - A number of people, to be determined by council, to assist the chairmen in maintaining and organizing such duties as described in Division D.

*Executive Board* – a committee comprised of all officers and chairmen.

*Council* – the Prior, Vice Prior, Exchequer, and Recorder (as defined by the Blue Book).

*Townie* - An active member not living in the house provided by Division K, Section B

*Week* - Days including Sunday through Thursday

*Weekend* - Friday and Saturday

## *Article 2*

Members shall be considered active members of Kappa Chapter, so long as they:

- 1) Full time undergraduate students at the University of Minnesota as defined by the University.
- 2) Members of the chapter in good standing and as decided upon circumstances deemed permissible by the then current Council.

Division B: Finances

### *Article 1*

Section A: Dues

- 1) Dues shall be determined by the Exchequer, according to the proposed budgets and other chapter related expenses.
- 2) Upon changing dues, it shall be voted on by 2/3 majority vote.
- 3) Lack of payment of dues can put any member into bad standing.

Section B: Fines

- 1) Any fine shall be a standard \$15.00 unless otherwise stated by law.

Division D: Chapter Government

Article 1: Elected Officers Duties

Section A: Prior

1. Must call for meetings on a weekly basis or at the request of the Executive Council.
2. Shall preside at all meetings of the Chapter.
3. Shall remove from office those chairmen who are negligent in carrying out their duties of a particular office with council approval.
4. Shall be member ex-officio of all committees with the right to vote but not held to do so.
5. Have one vote as an active member of the Chapter and another in the case of a tie.
6. Have the power necessary to command any frater to do that which may benefit the Chapter and the fraternity, pursuant to Blue Book.
7. Have the power necessary to discipline any frater who may disregard Div. D, Art. 1, Sec. A, part 7; or who in the view of the Prior and chapter council, may hinder the Prior in carrying out obligation set out in Div. D, Art. 1, Sec. A, part 9.
8. Shall be responsible to the Octagon for the welfare and actions of the Chapter, and its adherence to the regulations of the University of Minnesota and the Blue Book.
9. Shall preside over the Pinning and Initiation ceremonies.
10. Shall be responsible to communicate to the National SAM Fraternity office.
11. Shall attend all IFC meetings or appoint an IFC Representative to do so.
12. Shall be a permanent member of the Rush Committee.
13. Shall follow those duties as provided in Div. D, Art. 2, Sec. 3 of the Blue Book.
14. Shall live in the house.

Section B: Vice Prior

1. Shall be the acting Prior in absence of the Prior.
2. Shall supervise the Social, Philanthropy, and Brotherhood Committees.
3. Shall have membership on each committee, as mentioned in Div. D, Art. 1, Sec. B, part 2, with the right to vote.
4. Shall be the Executive Board Chairman.
5. Shall assist the Prior in carrying out policies and measures.
6. Shall be a permanent member of the Social Committee.
7. Shall oversee the all chairmen of the Chapter.

Section C: Exchequer

11. Shall collect and keep in trust all funds belonging to the Chapter.
12. Shall co-sign all fraternity checks with another member of council.
13. Shall prepare a budget on a semester basis.
14. Shall maintain and update all fraternity financial books and records.
15. Upon request, the balance of the fraternity will be available at the first meeting of every month.
16. Shall prepare monthly report to the National Headquarters.
17. Shall make any financial book, record, report available to any active frater who is in good standing.
18. Shall be empowered to enforce collection of all debts.
19. Shall prepare a complete financial report including balance statement and shall distribute it to the chapter each semester along with a complete explanation. This report shall be published after the beginning of fall semester.

Section D: Recorder

1. Must take minutes at every meeting, or delegate an assistant to record the minutes at any meeting that the Recorder might not be able to attend.
2. Must make available to council the minutes of the previous chapter meeting 48 hours prior to the next council meeting.
3. Must maintain all fraternity rosters.
4. Must maintain all records pertaining to candidates for affiliation and the records of all men who have signed biographies.
5. Must insure that proper work of all initiations of candidates completed and corresponds to the standards as prescribed in the Blue Book.
6. Prepare the monthly recorder's report for the National Office.
7. Take role call at each meeting.
8. Shall be responsible of the orderly maintenance of the files with respect to motions past by the chapter, and its correspondence.
9. Shall oversee the Alumni Recorder, Historian, Web Chair and Public Relations Chair.

Article 2: Committees and their duties

Section A: Chapter Council

1. Shall uphold the rules governing the fraternity.
2. Members shall be the Prior, Vice Prior, Exchequer, and Recorder.
3. Shall be responsible for appointing such chairmen and committee members that are not elected, with input from actives and respective chairmen.
4. Shall act in pursuant to the Blue Book, in Div. D, Art 2. and 3
- 5.



Section B: Recruitment Committee

1. Shall be under the guidance of the appointed Recruitment Chairman.
2. Shall be composed of the Assistant Recruitment Chair, Candidate Educator, Assistant Candidate Educator, Hillel Chair and other committee members.
3. Must work in conjunction with the Chapter Council.
4. Shall investigate every individual proposed and report on him fully to the Chapter.
5. Shall keep a permanent record of all proposed prospects.
6. Shall affiliate the approved prospects.
7. All recruitment documents must be approved by the Prior.
8. Shall have the power to extend bids resting solely on the Prior and Recruitment Chairman, with the understanding that any negative comments on the process of recruiting will be brought to the Recruitment Chairman, Recruitment Committee, the Executive Council or the Chapter.
9. Shall report to the Vice Prior.

Section C: Candidate Education Committee

1. Is responsible to the Chapter for execution of the written candidate program.
2. Shall be chaired by the Candidate Educator.
3. Shall be composed of the Prior, Assistant Candidate Educator and Big Brothers.
4. Candidate Educator shall be empowered to bar any active frater or alumnus from a candidate function (except the Prior or his official delegate).
5. Shall report to the Vice Prior.

Section D: Big Brothers

1. Shall serve on the Candidate Education Committee.
2. Shall be responsible for active engagement with respective little brothers.
3. Shall report to the Candidate Educator.

Section E: Hillel Committee

1. Shall serve on the Recruitment Committee.
2. Shall be the representative of the Chapter to Hillel.
3. Shall be responsible for active promotion of Hillel events within the Chapter and vice versa.

Section F: IFC Representative

1. Shall be appointed by council.
2. Shall be liaison between IFC and Chapter membership.
3. Must attend all IFC meetings.
4. Shall report to the Prior.

Section G: Social Committee

1. Shall be overseen by the appointed Social Chair.
2. Its members shall consist of the Assistant Social Chair, Homecoming Chair, Spring Jam Chair, Vice Prior and committee members.
3. Will arrange all social functions dealing only with Sigma Alpha Mu and its members.
4. Shall be in charge of all communications and execution of all out of house social functions and the Minnesota Greek Community.
5. Must report to the Vice Prior.

Section H: Homecoming Committee

1. Shall be overseen by the appointed Homecoming Chair.
2. Shall be appointed in the spring.
3. Its members shall include chairmen for each Homecoming activity.
4. Shall be responsible for schmoozing those fraternities and sororities that the Chapter is interested in pairing with.
5. Shall report to the Social Chair.

Section J: Brotherhood Committee

1. Shall be led by the appointed Brotherhood Chair.
2. Its members shall consist of the Athletic Chair and committee members.
3. Shall oversee the brotherhood activities of the fraternity.
4. Shall work to increase brotherhood among members.
5. Must report to the Vice Prior.

Section K: Athletic Committee

1. Shall be overseen by the appointed Athletic Chairman.
2. Must supervise, schedule and register all intramural and interfraternity athletic events.
3. Shall report to the Brotherhood Chair.

Section M: Philanthropy Committee

1. Shall be led by the appointed Philanthropy Chair.
2. Shall be responsible for organizing the fund-raising events for the fraternity.
3. Shall promote our national philanthropic organization, Pediatric AIDS.
4. Shall maintain a log of hours spent by members in community service.
5. Shall report to the Vice Prior.

Section P: Scholarship Committee

1. Shall be chaired by the appointed Scholarship Chairman.
2. Must collect the unofficial grade statements of all active members at the beginning of every semester.
3. Promote successful academics among Candidates.
4. Committee shall be in charge of developing programs and incentives to better the chapter.
5. Must report to the Vice Prior.

Section S: Alumni Recorder

1. Shall maintain contact with alumni of the Chapter.
2. Shall keep a complete directory of alumni.
3. Shall develop a newsletter to inform alumni of activities and alumni happenings.
4. Shall report to the Recorder.

Section T: Web Chair

1. Shall be responsible for the maintenance and development of the Chapter website.
2. Shall report to the Recorder.

Section U: Historian Committee

1. Shall be led by the appointed Historian.
2. Must keep accurate history of the Chapter.
3. Shall be responsible for the creation of the chapter scrapbook.

4. Must report to the Recorder.

Section V: Public Relations

1. Is chaired by the appointed Public Relations Chairman.
2. Is responsible for publicity of all chapter events and shall assist in the distribution of advertising materials.
3. Shall keep close contact with all sororities and their functions.
4. Must be responsible for maintaining the Sigma Alpha Mu Public Relations Policy.
5. Shall report to the Recorder.

Section W: All chair members shall be approved by a 50% vote of the approval of all members in good standing of Kappa Chapter of SAM. This vote shall be open ballot.

Section X: Executive Board

1. Shall meet once a week at a time and day determined by the Vice Prior.
2. Shall consist of every member who holds a chair or council position.
3. Attendance shall be mandatory.
4. The Prior is not required to attend.
5. Shall coordinate all fraternity events in a timely manner.

Division E: Meetings

*Article 1*

Section A: Meeting Procedure

The order of business of regularly scheduled meetings shall be:

1. Call to Order
2. Creed
3. Reading of the minutes of the previous meeting
4. Officer Reports
5. Committee Reports
6. Old Business
7. New Business
8. Good and Welfare
9. Adjournment
10. Fast and Firm

Section B: The meetings should be open to fraters and alumnus in good standing.

Section C: A motion will be voted on at the meeting unless the motion involves changing a bylaw, in such case will be tabled for at least one week. Changing any bylaw requires 2/3 majority vote.

Section D: Rules of Parliamentary procedure shall be utilized in running the meeting.

*Article 2*

Section A: Attendance at all regularly scheduled meetings is obligatory unless an excuse is granted by the Prior, prior to that meeting.

Section B: No business shall be considered unless a quorum (one more than half the active membership in good standing) is present.

Section C: After one warning, the Prior may eject a frater from the meeting for misconduct.

Section D: All members in good standing who wish to speak in front of the membership must notify the council at least 24 hours in advance of the meeting.

Section E: General meeting attire shall be dress slacks, dress shoes (no open toed shoes), and button down shirt with tie.

Division H: Election Procedures and Guidelines

Section A: Nominations

1. Formal nominations shall take place at the fifth to last week of the spring semester.
2. All potential candidates must meet qualifications stated in the Blue Book.
3. Any nominee for office can not be on academic probation
4. Any nominee must be in good standing
5. Once a nominee has been nominated there must be a second by another member.
6. Any member has the opportunity to accept or decline the nomination.

Section B: Elections

1. Elections shall be held on the fourth to last week, of regular meetings, of the spring semester.
2. A four week transition period and officers will be installed after the completion of the Chapter Officer Transitioning.
3. Candidates running shall be allowed to address the chapter.
4. A question and answer period will follow each speech.
5. Nominees shall be voted on by secret ballot and must win by a 2/3 majority vote.
6. Only Alumnus and a Council Member not running for office shall count votes.
8. If an unopposed candidate does not receive the required majority votes the floor will be reopened for nominations.
9. If no candidate receives the required simply majority, the top two vote getters shall have a run off.

### *Article 3*

Special Elections

Section A: Upon vacation of any executive council office, there will be nominations and voting done by the following meeting.

Section B: Upon vacation of any chair, the council member whose position the chair falls under shall appoint a replacement to be approved by the house by a simple majority vote.

Section C: Upon vacation of any of the following positions a special election shall be held at the next meeting.

## *Article 5*

### Section A: Impeachment

Any Executive Council member may be impeached. The procedure is as follows:

1. Any member, active, may file charges.
2. There will be discussion on both sides of the issue before the active chapter, with the accused person.
3. The accused may answer questions.
4. Final impeachment will occur with a quorum of the active chapter.

### Division L: Scholastic Policy

#### Section A: Grade Reports

1. An unofficial grade report, produced by the University of Minnesota will be required to be turned by every member into the Scholarship chairman or Vice Prior by the second chapter meeting of each semester.
2. If a member does not produce such report on time, they shall be fined. A late transcript will take said member out of contention for any scholastic recognition.
3. The GPA on the transcript will be the member's official GPA for the house regardless of any other reports.

Section B: The GPA required by the Chapter will be no less than a 2.25 to remain in good standing.

#### Section D: Scholarship

1. Any member who achieves a 3.5 GPA or higher will receive \$100 dollars off the following semester's dues. (Ex. Fall GPA of 3.8 would give a member \$100 off Spring dues)
2. Scholarships will not be applicable for any member who graduates during such semester. (Ex. Spring GPA 3.5 will not be granted scholarship if member graduates that Spring).
3. Scholarships can not be cashed in for any other reason.
4. Candidates are applicable. Scholarship is only rewarded on active member dues. It can not be used to pay for Candidate dues or the initiation fee.

#### Section E: Penalties

For members who do not achieve the set GPA, the following repercussions will occur:

1. Candidates can be held over for one semester if it has become apparent that such Candidate is struggling in classes. This decision will be made at a hearing between the candidate, the current council, Candidate Educator, and the scholarship chair. Any Candidate who can not make the required GPA for two semesters in a row shall be asked to break ties with the fraternity.
2. Actives who do not meet the required GPA will be put on Academic Warning. This will consist of a required two mandatory study nights a week no longer than two hours and no shorter than one hour.

3. Actives who do not meet the required GPA for two semesters in a row will be placed on Academic Probation. This will be the same as Academic Warning except that said active will not be allowed to attend house functions during the week.

Section F: Any member that holds any position and is placed on Academic Probation shall relinquish their position.

Division N: Amendments

Section A: Amendments to these by laws shall follow the procedure as outlined in Division E, Section C.

Division O: Bad Standing

Section A: Any member can be put into bad standing for any of the following reasons:

1. Unpaid debt, alumni or active
2. Unpaid fines after one week of the date it was issued

Section B: A member can be put into bad standing following inappropriate behavior. Such a punishment shall be determined by a hearing between the current council and said member. Inappropriate behavior will be defined as any behavior which is reflected poorly towards the house and may hurt the image of the house. Punishment of such behavior shall not exceed the length of one year without further problems from said member.

Section C: Any member accused of any sexual allegations shall be put into immediate bad standing until allegations are cleared upon the house in an emergency meeting held by the council. Council will then call an emergency meeting and address the chapter accordingly. Punishments shall be determined by council. Such punishments can include expulsion from the house, in such a case the chapter will hold a vote at the emergency meeting, a simple majority is required.

Division P: General Rules

Section A: Attendance at weekly chapter meetings will follow guidelines set in the Blue Book; 75% attendance. Anything less will result in a fine.

Section B: The chapter budget shall be approved by the house by a 2/3 majority vote at the beginning of every semester. No chapter money shall be spent without approval of the budget for that semester.

### ALCOHOL AND DRUGS

1. Chapter officers and committee chairmen shall be familiar with all applicable laws, university regulations, interfraternity council rules, and fraternity policies concerning alcoholic beverages and other controlled substances.
2. The possession, sale, distribution, use or consumption of alcoholic beverages, while on chapter premises, during a fraternity event, in any situation sponsored or endorsed by the chapter, or in any event an observer would associate with the fraternity, must be in compliance with any and all applicable laws of the state, province, county, city, and institution of higher education (including interfraternity council policies), and must comply with either the BYOB or Third Party Vendor Guidelines.
3. No alcoholic beverage may be purchased through chapter funds nor may the purchase of same for members or guests be undertaken or coordinated by any member in the name of, or on behalf of, the chapter. The purchase, use, or possession of a bulk quantity or common sources of such alcoholic beverage, i.e. kegs or cases, is prohibited and the chapter shall not permit their possession or use by members or guests, on chapter premises or at any chapter function.
4. A chapter shall not sell alcoholic beverages to members or guests by selling tickets or cups, by charging admission fees, by taking up collections, or by any other direct or indirect means of collecting moneys from persons attending chapter functions.
5. Open parties, meaning those with unrestricted access by non-members of the fraternity, without specific invitation, where alcohol is present, shall be prohibited. The term *open party* also includes:
  - a social function to which non-members are invited by a blanket or open invitation, express or implied;
  - a social function to which non-members are invited through advertising or publicity, including signs, posters, billboards, handouts, and the use of newspapers, radio, or television;
  - a social function hosted by a chapter to which the number of non-members invited is greater than twice the number of chapter members in good standing;
  - a social function co-hosted by two fraternity or sorority chapters to which the number of non-members invited is greater than the membership of the host chapters;
  - a social function co-hosted by three or four fraternity or sorority chapters to which any non-members of the host chapters are invited; and
  - a social function co-hosted by more than four fraternity or sorority chapters.
6. No members, collectively or individually under chapter auspices, shall purchase for, serve to, or sell alcoholic beverages to any minor (i.e., those under legal "drinking age").
7. The possession, sale, or use of any illegal drugs or controlled substances while on chapter premises or during a fraternity event or at any event that an observer would associate with the fraternity, is strictly forbidden.
8. No chapter may co-sponsor an event with an alcohol distributor, charitable organization, or tavern (tavern defined as an establishment generating more than half of annual gross sales from alcohol) where alcohol is given away, sold or otherwise provided to those present.
9. No chapter may co-sponsor or co-finance a function where alcohol is purchased by any of the host chapters, groups, or organizations.
10. All rush activities associated with any chapter will be DRY rush functions.
11. No member shall permit, tolerate, encourage, or participate in "drinking games."
12. No alcohol shall be present at any candidate program, activity, or ritual of the chapter.
13. Each chapter shall actively promote and support the adoption of dry rushing policies by the interfraternity council and university administration on its campus.
14. For the purposes of this Policy, the term *chapter* includes colonies, interest groups and alumni clubs.

### HAZING

Candidate education programs are to be limited to 8 weeks or less. No chapter, colony, student, or alumnus shall conduct nor condone hazing activities. Hazing activities are defined as: "Any action taken or situation created, intentionally, whether on or off fraternity premises, to produce mental or physical discomfort, embarrassment, harassment, or ridicule. Such activities may include but are not limited to the following: use of alcohol; paddling in any form; creation of excessive fatigue; physical and psychological shocks; quests, treasure hunts, scavenger hunts, road trips, or any other such activities carried on outside or inside of the confines of the chapter house; wearing of public apparel which is

conspicuous and not normally in good taste; engaging in public stunts and buffoonery; morally degrading or humiliating games and activities; and any other activities which are not consistent with academic achievement; fraternal law, ritual, or policy; or the regulations and policies of the educational institution, or applicable state law."

Candidate class trips (road trips or walk outs) are prohibited unless the following conditions are met: (1) The trip cannot be mandatory or serve as a requirement of initiation, (2) Candidates may not make up more than 50% of the participants, (3) At least one member of the Chapter council must go on the trip, (4) If visiting another chapter, the chapter being visited must be contacted four weeks prior to the trip and they must give permission for the visit to occur, (5) Weekend trips should not exceed seven hours of travel time (round trip), and (6) All participants must sign a waiver agreeing to abide by Fraternity Risk Management Policy and agreeing to hold the chapter and Fraternity harmless.

Intensive final week(s) or day(s) of candidate programs are prohibited, as are any events that require the candidates to "sleep over". "Hell Week/Day", "Help Week", "Inspiration Week", "Work Week" and other such intensive activities are specifically prohibited.

### SEXUAL ABUSE AND HARASSMENT

The fraternity will not tolerate or condone any form of sexually abusive behavior on the part of its member, whether physical, mental or emotional. This is to include any actions which are demeaning to women or men including but not limited to date rape, gang rape or verbal harassment.

- Strippers at chapter events are specifically prohibited.
- Chapters are expected to abide by all applicable laws.

### FIRE, HEALTH, AND SAFETY

- All chapter houses should meet all local fire and health codes and standards.
- All chapters should have posted by common phones emergency numbers for fire, police and ambulance and should have posted evacuation routes on the back of the door of each sleeping room.
- All chapters and house corporations must cooperate with chapter facility inspections that are requested by the Octagon or the Fraternity's insurance provider, in addition, chapters, in cooperation with the house corporation, must respond in writing to any corrective actions recommended as the result of facility inspections.
- The possession and/or use of firearms or explosive devices of any kind within the confines and premises of the chapter house is expressly forbidden.

### EDUCATION

Each fraternity shall annually instruct its students and alumni in the Risk Management Policy of FIPG, Inc. Additionally, all student and alumni members shall annually receive a copy of said Risk Management Policy. Each chapter shall conduct a risk management review for all members every semester/quarter. In addition, candidates shall be educated on the Sigma Alpha Mu Risk Management Policy within two weeks of affiliation; this includes successful completion of the AlcoholEdu program within five weeks of affiliation.

### GENERAL

Payments of all liability insurance premiums shall be made by the due date specified in the invoice.

Potentially risky events ("Fight Night", "Car Smashes", and "Bull Riding"), are specifically prohibited unless permission is obtained from the Octagon. Requests for special permission must be submitted by the risk manager eight weeks prior to the event.

No chapter, house corporation or alumni club may enter into any agreement agreeing to name any organization an "additional insured" on the Fraternity's liability insurance policy without written permission from the Octagon. Applications for "additional insured" status must be submitted to the Executive Office and insurance carrier for approval at least two weeks prior to the date needed.

(revised 6/06)

# SEXUAL ABUSE

## What is Sexual Abuse?

In order to understand sexual abuse, we must define both sexual harassment and rape.

- Sexual harassment is defined as the unwelcome, unreciprocated imposition of sexual attention, usually in the context of a relationship of unequal power.
- Rape is defined as an act of sexual penetration with a person against his/her will.

Both of these actions fall under the definition of sexual abuse. There are many types of sexual abuse. Sexual abuse behavior occurs on a continuum ranging from harassment to rape and usually falls into one of two categories, verbal and physical.

Verbal abuse may include:

- Whistling
- Humor and jokes about sex of male or female specific traits
- Suggestive or insulting sounds
- Sexual innuendoes about your or someone else's personal appearance
- Demands for sexual favors accompanied by implied or overt threats

Physical abuse may include:

- obscene gestures
- staring suggestively
- any inappropriate touching, pinching or patting
- brushing against someone else's body
- coerced sexual intercourse
- assault

## What Should You Do?

- Confront situations. If you observe someone sexually abusing another individual, either verbally or physically, stop them and tell them you do not like what you are seeing or hearing.
- If you have knowledge of a sexual abuse incident, inform a chapter officer and the chapter advisor. If there is a merit to the allegations, the chapter president and chapter advisor should contact the National Office immediately.
- Act quickly and responsibly.

Understand that you are responsible for your own actions as an individual and as a member of a group. Understand your own sexuality and be aware of social pressures.

**UNDERSTAND THAT “NO” MEANS NO!**



# SIGMA ALPHA MU FRATERNITY

## PUBLIC RELATIONS POLICY

The image of Sigma Alpha Mu held by the public is dictated by what is seen of its members. Since Sigma Alpha Mu Fraternity is proud of its image and wishes to protect it, all chapters are now asked to abide by the following policy relating to any visual impression a chapter or member may make on behalf of the Fraternity.

For any of the following which bears the name of Sigma Alpha Mu Fraternity, the name of any of its chapters, its crest, its letters, or any of its nicknames:

shirts	press releases
flyers	banners
manuals	glassware
publications	party favors
posters	slogans
newspaper articles & advertisements	computer web pages

There may not be:

- any depiction of alcohol, alcoholic beverage use, kegs, beer cans, alcohol bottles, beer bong, brand names, or depiction of sales;
- any depiction of drugs, drug use, drug slogans or slang words, or drug paraphernalia;
- any depiction in a demeaning way, of minorities, ethnicities, or cultural segments;
- any religious depictions in a demeaning way;
- any depictions of women in a demeaning way;
- any depictions relating to sex, sexual paraphernalia, or sexual orientation;
- any use of profanity;
- or any use of licensed or copyrighted characters, phrases, logos, or materials (including Yosemite Sam, Dr. Seuss' "Sam I Am", Absolute, etc.)

The Prior, or Vice Prior as Risk Manager, should approve all items governed above before their use or publishing or printing.

If you are unsure about an image or slogan, contact the [Executive Office](#) for approval.

# SIGMA ALPHA MU FRATERNITY

## THIRD PARTY VENDOR CHECKLIST

### THE CHAPTER PRIOR:

Your chapter will be in compliance with the risk management policies of the Fraternity and FIPG if you hire a "third party vendor" to serve alcohol at your functions WHEN you can document the following checklist items.

### THE VENDOR MUST:

\_\_\_\_\_ 1. Be properly licensed by the appropriate local and state authority. This might involve both a liquor license and a temporary license to sell on the premises where the function is to be held.

#### **ATTACH COPIES OF STATE AND LOCAL LICENSES TO THIS CHECKLIST.**

\_\_\_\_\_ 2. Be properly insured with a minimum of \$1,000,000 of general liability insurance, evidenced by a properly completed certificate of insurance prepared by the insurance provider.

The above "certificate of insurance" must also show evidence that the vendor has, as part of his coverage, "off premise liquor liability coverage and non-owned and hired auto coverage."

The certificate of insurance must name as additional insured (at a minimum) the local chapter of the fraternity hiring the vendor as well as the national fraternity with whom the local chapter is affiliated.

#### **ATTACH A COPY OF THE CERTIFICATE OF INSURANCE AND HIGHLIGHT REQUIRED CLAUSES.**

\_\_\_\_\_ 3. **Agree in writing** to cash sales only, collected by the vendor, during the function.

\_\_\_\_\_ 4. Assume in writing all the responsibilities that any other purveyor of alcoholic beverages would assume in the normal course of business, including but not limited to:

- A. Checking identification cards upon entry;
- B. Not serving minors;
- C. Not serving individuals who appear to be intoxicated;
- D. Maintaining absolute control of ALL alcoholic containers present;
- E. Collecting all remaining alcohol at the end of a function (no excess alcohol - opened or unopened –is to be given, sold or furnished to the chapter).
- F. Removing all alcohol from the premises.

**ATTACH A WRITTEN AGREEMENT SIGNED AND DATED BY THE CHAPTER PRIOR AND**

**THE VENDOR STIPULATING AGREEMENT TO THE ITEMS REQUIRED IN #3 AND #4**

**ABOVE.**

This form must also be signed and dated by both the chapter prior or vice prior and the vendor. In doing so, both parties understand that only through compliance with these stipulations and the Sigma Alpha Mu Risk Management Policy will the event be in compliance with FIPG and Sigma Alpha Mu Fraternity requirements.

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Chapter Prior's Signature & Date

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Vendor's Signature/Company & Date

Adapted from FIPG Third Party Vendor Guidelines

# Chapter Development Guide



**Created By:**  
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