

OFFICIAL GUIDE TO A SUCCESSFUL ALUMNI ASSOCIATION



TAU KAPPA EPSILON
— Better Men for a Better World —

THE FRATERNITY FOR LIFE

TKE DOESN'T END AFTER GRADUATION

HOW TO GET INVOLVED

EASY, WELCOMING AND FUN

ALUMNI ASSOCIATIONS

EVERYTHING YOU NEED TO KNOW



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Tau Kappa Epsilon has been described as the Fraternity for Life for many years. We say Fraternity for Life constantly. Alumni Associations put those words into action by engaging generations of TKE alumni in both their chapters and where they live.

In this guide, you will find the basic elements of establishing and growing your Alumni Association.

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It is important to understand that this guide is intended to help new Alumni Associations get started and provide an overview of resources for established associations. The TKE Alumni Engagement Team (TKE.org/Contact) is available to answer additional questions as you craft your Alumni Association experience.



Chartering an Association

Alumni associations exist to support and energize the relationships among alumni Fraters. Chapter-based groups focus on connecting the alumni across the generations of their own scroll regardless of where they are on the map. Some groups have many of their alumni still concentrated near the campus or in one or two primary metro areas and may be able to sponsor more regular events. Other groups' alumni may be widely scattered across the country and beyond; they may host fewer events and focus on one or two signature events each year. Either way, chapter-based groups should focus heavily on connectivity and communication with all of their alumni.



Fraters interested in formalizing an association are encouraged to communicate with the TKE Professional Staff. This ensures you have support throughout the process, receive the most current information, ask questions, and can relay accurate information to other Fraters for a more streamlined process.

Given that their membership all live within a defined metro area or region of the state, area-based groups can often create a more robust schedule and mix of events.

Area- and chapter-based groups can co-exist and should not be considered in competition or at odds. Area groups can still support events that are primarily for men from a particular chapter, and chapter groups can invite additional area Tekes to their events.

Some groups embrace a multi-dimensional plan to address both pools of members. In other cases, multiple associations exist and communicate with each other to coordinate as needed.

Demonstrated Interest:



Names and current email addresses for 20 or more interested Fraters.

Leadership:



An initial slate of officers including, at a minimum, president, vice-president and secretary/treasurer

Chartering Fee:



A \$200 term fee will charter the group through the biennium. Term charters expire and are renewable at the end of each Conclave. There is also a lifetime option for \$1,000. Lifetime charters persist as long as the group remains active and is responsive to headquarters.

Once deciding how you want to organize and what audience(s) you wish to serve, you and your fellow Fraters can pursue an official charter for your group. The lists of Fraters and officers should be emailed to the headquarters staff, and then payment details can be discussed. There are three primary steps to chartering: demonstrated interest, leadership, and selecting a chartering fee option.

Alumni Association Structure

Your association should be structured as formally as it needs to be to meet your members' needs. A basic set of bylaws and an officer team will keep you organized and on track. These are some best practices to get your group started.

- Bylaws should be developed locally to fit your needs. Sample chapter bylaws found at TKE.org/AA-Bylaws can help you start this process.
- Incorporation is not a Fraternity requirement for your association. It will become necessary if you wish to open a bank account for the association. Most financial institutions will want to see Bylaws, State Incorporation and a Federal Employer Identification Number. TKE.org/AA-Incorporation
- Tax-Exempt Status is not required for your association. The vast majority of collegiate chapters are non-profit corporations defined as 501(c)(7). Most of the incorporated Alumni Associations do the same by defining themselves as social clubs. The additional tax filings and maintenance required for a 501(c)(3) isn't a needed step if the association simply uses the TKE Foundation to administer scholarships and donations.
- Tax filings for small organizations with annual revenue under \$25,000 have been a requirement since about 2010. For most alumni associations, this requirement is met by filing a 990N E-postcard. Larger associations with additional income and assets should enlist a professional accountant.
- A house corporation separate from the Board of Advisors should hold chapter property. This is not an Alumni Association's responsibility.
- The Black Book contains the Constitution and Bylaws of Tau Kappa Epsilon Fraternity. The Black Book includes descriptions of alumni associations and chapter corporations—providing additional clarity and the legal descriptions of both. TKE.org/Blackbook

Officers and Committees

Avoid getting hung up on ideas of hierarchy or remembering the way your chapter functioned. Your alumni association will have members with many other responsibilities. Giving members ownership of programs and events they are passionate about will make delegation much simpler. Delegation of responsibilities is the key to a sustained alumni association.

Bylaws should include officer roles and responsibilities. Please note that we typically use more standard officer titles in our alumni associations and not the traditional TKE titles used in our collegiate chapters. Officer positions may vary among alumni associations based on local needs, but all should have a regular election date and term. Office terms will help keep one person from feeling trapped in a position and give others the ability to contribute.

- **President** will serve as chief executive—presiding at meetings and supervising all activities of the association.
- **Vice President** will assume the duties of the President if he is unable to be present. The Vice President may also help to guide committees and projects.
- **Secretary** will keep accurate records of sessions, roster and matters pertaining to the association's welfare and membership. He will communicate these to the members of the association.
- **Treasurer** will oversee the association funds and keep accurate and transparent records. Dues collection should be in accordance with bylaws.
- **Historian** is a position some associations have added. Much as the chapter Histor ensures all members sign the scroll and update their contact information, the association Historian can help track down members updating their information. The Historian can also help keep the database current.
- **Committee Chairs** are critical for events. Committees will be the engine for your association and support programs for the members and other initiatives. Founders' Day, significant anniversaries and events like golf outings may each have their own committee. You may want a communications committee to publish newsletters and manage social media. A recruitment committee may support senior transitions and engaging alumni who have not yet been involved in the association.

Engagement Data Explained

The Alumni Engagement tab is available in the chapter module for both association and chapter leaders. This data is compiled for chapters; there is no correlating data yet for area-based alumni associations. We encourage association leaders to share and discuss this information with both collegiate and alumni leaders. A team-based, intentional and strategic approach creates opportunities to improve outreach and engagement. Volunteers at all levels and Professional Staff are available to support your efforts.

Membership Statistics

Total Initiates Ever <i>How many members have ever initiated into the chapter?</i>	1697
Total Living Initiates <i>How many living members have initiated into the chapter?</i>	1054
Total Honorary Members <i>How many honorary members have initiated into the chapter? Last honorary member was initiated on 03/28/2003.</i>	22
Alumni Association Members <i>Count based on the roster and/or listings provided by Association leaders. The software to track this is forthcoming.</i>	0

Contact Chris Niles, Director of Alumni Engagement, with questions about reporting, resources or strategies.

General Notes:

- Alumni counts include Fraters who joined through both collegiate and honorary initiations.
- References to “your alumni” include only those Fraters initiated on your scroll.
- Other counts - Local Event Participation, for example – may include alumni from other chapters.
- Most “year” references are fiscal year (June-May); Life Loyal Teke reporting is calendar year based.

Engagement Data Explained

Alumni Outreach

Lost/Missing Information <i>Count of your alumni with missing contact information. View at TKE.org/lost.</i>	408
Newsletters <i>Count of alumni newsletters submitted to TKEHQ. Submit on Forms section.</i>	0
THE TEKE <i>Count of your alumni receiving the Fraternity's magazine throughout the year.</i>	42
Social Media Accounts <i>Chapters should have their social media accounts on file with TKEHQ.</i>	Yes

Alumni Involvement

Alumni Association <i>Chapters should have a formally chartered alumni association or be tied with an area group.</i>	Yes
Lifetime Life Loyal Tekes <i>How many members joined Life Loyal Teke prior to 2014?</i>	6
Current Year Life Loyal Tekes <i>How many members are current with their Life Loyal Teke giving? Become an LLT.</i>	22
MyTKE.org Accounts <i>How many alumni/honorary initiates have MyTKE.org Accounts?</i>	131
Local Event Participation - Total Attendance <i>Total counts of alumni from this year's events and attendance lists reported to headquarters. Submit here.</i>	0
Local Event Participation - Unique Attendees <i>Total counts of alumni from this year's events and attendance lists reported to headquarters. Submit here.</i>	0
TKE Program Event Participation - Total Attendance <i>Total counts of your alumni attending Province Forums, RLCs, Alumni Volunteer Academy, or Conclave. Learn More.</i>	7
TKE Program Event Participation - Unique Attendees <i>Total counts of your alumni attending Province Forums, RLCs, Alumni Volunteer Academy, or Conclave. Learn More.</i>	5

Volunteer Involvement

Current Year Volunteers <i>A count of your alumni who have served in a titled volunteer role this year.</i>	17
Online Volunteer Education <i>A count of your alumni who have completed online training this year.</i>	4
Verified Volunteers - Chapter Advisor <i>Key leaders are asked to sign an annual agreement verifying and committing to their role. Send via KRA Details page.</i>	No

Alumni Outreach

Lost/Missing Information can be a mailing address, phone and/or email.

THE TEKE is sent to volunteers and donors. Increasing Life Loyal Teke participation helps generate financial support and also gets the magazine to more of your alumni, increasing their awareness of what is happening throughout TKE Nation.

Alumni Involvement

Lifetime Life Loyal Tekes are those donors who made a one-time Foundation donation in the original version of the program. This count is a static number as the program is now built around annual giving. Lifetime members are still encouraged to consider making a yearly gift.

Current Year Life Loyal Tekes is the count of donors to the program within this calendar year. Annual

donations to Life Loyal Teke can be made in any amount and can be made either as a single payment or spread over multiple months.

100% of all Life Loyal Teke donations go directly to supporting educational and leadership programs such as the Regional Leadership Conferences and the Alumni Volunteer Academy.

MyTKE.org is the membership portal that allows Fraters to check and update their personal information and access other online tools/resources. Individuals can claim their accounts with their birthday and/or scroll number.

Local Event Participation numbers are based on events and attendance lists that are reported.

TKE Program Participation numbers indicate registration for HQ sponsored/ supported educational programs.

Engagement Data Explained

Alumni Involvement

Alumni Association <i>Chapters should have a formally chartered alumni association or be tied with an area group.</i>	Yes
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Alumni Involvement

Online Volunteer Education content is made available annually. This content includes Alumni Volunteer Academy materials, and may also include other online modules available on our eLearning platform at Edu.TKE.org.

Verified Volunteers acknowledges whether key volunteers have yet verified themselves within this fiscal year. 2020-2021 is the first year board members are being asked to do this in addition to the chapter advisor.



Chapter Association Events

The primary purpose of a chapter alumni association is to serve the chapter's alumni. Over time, this will generate additional support for the collegiate chapter. Events are often campus-based but don't overlook hosting events where your alumni live rather than expecting them to return to campus. Consider inviting other friends of the chapter—sweethearts, past advisors, etc.—as well as nearby Tekes from other chapters to build the community.

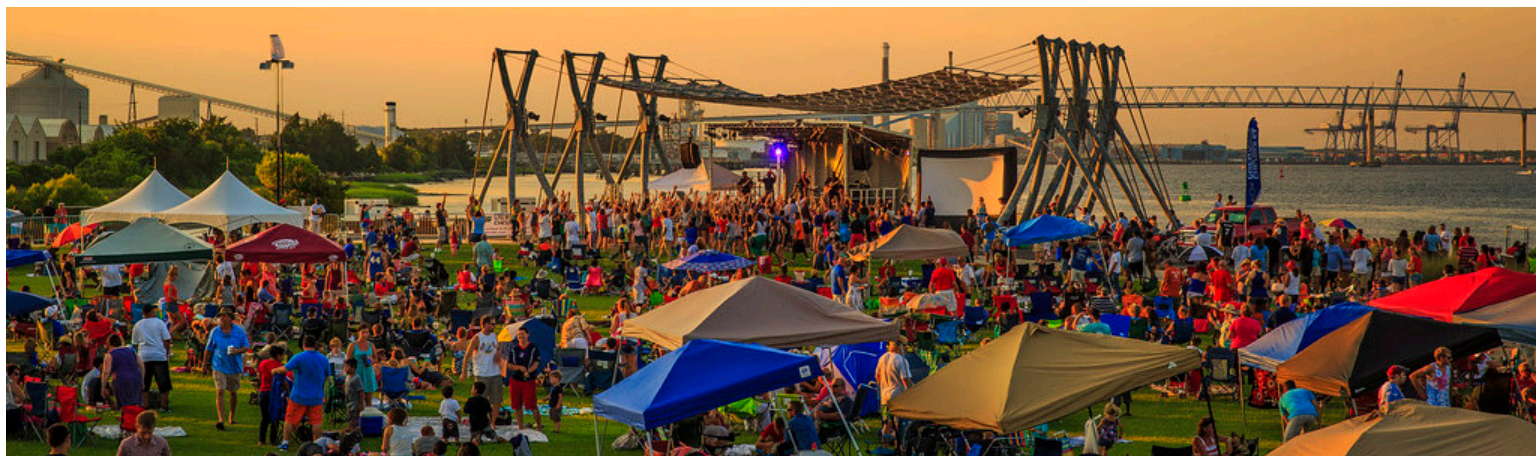
- **Homecoming** is a major alumni event on many campuses. Piggybacking onto this or other institution-sponsored events when members may be feeling nostalgic about their school days is a great fit. Plan something to complement the activities the university has already planned. Something that is uniquely yours will attract more attendance.
- **Fall Events** can create unique local traditions for chapters from universities that don't have a campus homecoming. Alumni Associations often develop their own fall tradition. Events like clambakes and cookouts that get folks outside are very popular.
- **Anniversary** event planning should always be underway. Have teams consider the next major milestones. 10 years to 40 years will draw a crowd. Think about breaking up events after the 40th anniversary to celebrations every five years. As alumni retire, they enjoy meeting up more often. A major milestone anniversary typically takes over a year of planning. Set a date early. Invite speakers 6 months ahead. Set a price that includes as many people as you can. Be mindful of the collegiate chapter when you set pricing to allow them to attend.
- **Founders' Day** is an easy event to build into an annual gathering. Everyone knows the date. Many area associations are already planning events you could attend as a group if an event near campus is not practical.
- **Scholarship Fundraising Events** such as golf outings, dinners, bowling tournaments, that are fun and have a cause behind them often draw a larger group of alumni that are interested in making a difference.
- **Family Friendly Events** like picnics and sports outings help build relationships and expand our TKE family. Be inclusive and encourage family participation at every event possible.
- **Ritual** is an excellent opportunity for alumni to participate and be reminded of their collegiate years and our shared values. The Fraternity for Life ritual, which celebrates seniors' transition to alumni, is also open for all alumni. Regular alumni attendance at initiations is a great demonstration to the chapter of the real meaning of the Fraternity for Life. Alumni can also sponsor new alumni to bring to the chapter who can join through honorary initiations.

Area Association Events

Area Alumni Associations engage members where they live and work while bringing together alumni from many different chapters. This builds lifelong relationships and professional networks across the Fraternity. Welcoming alumni Fraters from any chapter is critical. Diverse events planned by committee chairs in your association will help build your appeal to local alumni. Consider the interests, availability and preferences of alumni of different ages. Include events that are family-friendly and include family, friends and guests.

Take advantage of existing venues and community events that people may already be attending. Committees will allow you to put together a variety of activities each year to keep members engaged.

- **Happy Hour** events and cocktail hours are a good introductory event to introduce new members to the association.
- **Family Events** such like apple picking, baseball games, picnics, softball tournaments, volunteer events, and other activities that will get alumni to bring their spouses, partners and kids will give your association staying power.
- **Networking Events** are specifically to build business connections. Hosting an event for a specific field with a keynote speaker, some refreshments, and plenty of time for alumni to talk will make you relevant to more local alumni. Be sure to set some ground rules and expectations so the event isn't a job fair.
- **Founders' Day** is a natural event for Area Alumni Associations. Many people will have TKE on their minds. They are just coming off the holiday season and are looking for something fun to do. Dinners, Dinner Cruises and Luncheons work well. Be sure to set the date early and remember to give guest speakers plenty of lead-time if you want them to attend.



Area Association Events

- **Sporting Events** can be easy to access but require good planning and can be more complex if advance payment is required. Work directly with the team/venue to explore options for promotion, pricing, timing, and also cancellation. Early announcements and a deadline can avoid some of the stress these events can produce. Remember this is about being together. Minor-league events can be just as much fun for a group as a major league game.
- **Community Events** make for easy participation. Consider local festivals, live performances, fundraising events and other community events. What events might your fellow Fraters already be coming out for? Advertise a time and location for a simple meetup. Fraters might enjoy the event along with others or may still choose to do it on their own. The St. Jude Walk/Run can be a great experience and a way to support the TKE fundraising efforts. Organize a TKE team for local fundraisers, walks, stair climbs, spartan races, etc.
- **Ritual** is an excellent opportunity for alumni to participate and be reminded of their collegiate years and our shared values. The Fraternity for Life ritual, which celebrates seniors' transition to alumni, is also open for all alumni. Regular alumni attendance at initiations is a great demonstration to the chapter of the real meaning of the Fraternity for Life. Alumni can also sponsor new alumni to bring to the chapter who can join through honorary initiations.



St. Jude Events

In 2019, Tau Kappa Epsilon and St. Jude Children's Research Hospital® announced a commitment to raise \$10 million for St. Jude within the next 10 years, which has been recognized by the naming of the hospital's Bone Marrow Transplantation & Cellular Therapy Research floor. This campaign marks the third commitment TKE has made to the hospital since the fraternity officially began its partnership with St. Jude in 1972.

- **St. Jude** holds its signature Walk/Run during childhood cancer month in September of each year. It is typically a fun day spent working for a great cause. There are presentations, prizes, and plenty of attractions on hand before the walk kicks off. Teams will often dress alike, bring flags and banners and make their presence known. This is a great friends and family event for your association. Locations across the United States are announced months in advance with incentives offered for early registrations.
- **Fundraising Portals** provided by St. Jude allow your Alumni Association to form a team and add members right away. Individual team members can share their page and raise funds from friends and family to support the team. You can request a page by contacting TKEOGC@TKE.org.
- **Gold Level Sponsorship** by TKE for this event means that our members can sign up for the walk without paying registration fees. The association can start building a team, and members can simply focus on hitting their goal.



TKE Leadership & Educational Programs

There is a broad spectrum of TKE programming each year. The list of events below highlights key opportunities for quality education and peer networking. Some of these events also create a window for hosting additional receptions, remote meetings, reunions or other crossover events. Each year, there are additional volunteer planning events, new or pilot programs, and additional video and online resources made available.

- **Province Forums** are led by the volunteer Province Team in your area and supported by the Professional Staff. These one-day educational events will provide opportunities for collegiates and may include alumni programming. These will typically happen in the fall. Organizing a reception to follow the event is an excellent opportunity to connect with a larger alumni base.
- **Regional Leadership Conferences** are held between the last weekend of January and the first weekend of March. The dates for these conferences are typically released by the start of the fall term. RLC is typically held in a major city at a hotel. The program will run over the course of a weekend, including both collegiate and alumni content. The alumni engagement team will coordinate with the local Alumni Association on receptions.
- **Alumni Volunteer Academy** is a summer program that occurs in non-Conclave years. This program brings together volunteers from all parts of TKE Nation for interactive education and training along with opportunities for proactive dialogue within this diverse group of volunteers and with professional staff and members of the Grand Council. Our volunteer training efforts are supplemented annually with additional video and online resources.
- **Conclave** is the biennial convention of the Fraternity. Chartered alumni associations are expected to have a voting delegate present at Conclave. Your association plays a role in our Fraternity's governance and gets to vote for the election of the Grand Council and on any proposed legislative changes to the Black Book. Conclave also includes extensive programming for both collegiate and alumni Fraters. A robust Family and Friends program has been greatly expanded over the past several Conclaves and is a great experience for spouses, partners, kids, parents, grandparents, grandkids and more. Conclave can provide an opportunity for destination meetings and reunion events.

Fraternity Rituals

Ritual is an opportunity for members of your Alumni Association to reconnect with the values and ideals of the Fraternity. Your chapter or a local chapter can help to facilitate the ritual. Headquarters can also provide support your preparations

- **Initiation** is a wonderful moment for alumni to participate in the life of a chapter and to demonstrate the true meaning of Fraternity for Life.
- **Officer Installations** mark important moments in the leadership of a chapter. Having alumni attend the ritual sends an important message and also helps alumni Fraters to maintain relationships with current officers.
- The **Fraternity for Life** ritual is a celebration of collegiate members as they graduate and become alumni Fraters. The ritual is also open for all alumni; it can be particularly valuable for those who were not given the opportunity to experience this ritual as a student and as a touchstone and reminder for others who have seen it before. Your chapter or a local chapter can help to facilitate the ritual.
- **Alumni Associations** are encouraged to be the champions of the Fraternity for Life ritual and ensure that it is performed for graduating seniors at the end of the fall and spring terms to help welcome new members into their associations.
- **Area Alumni Associations** may also find particular value in holding the Fraternity for Life ritual as an alumni engagement opportunity and a recruitment tool for the association.
- **Fraternity For Life Pins** are provided to chartered associations at no charge. We prefer for the association's leadership to keep an inventory of pins on hand. Please email headquarters with a list of names and current email addresses of participants each time you celebrate the Fraternity for Life ritual. This allows us to update everyone's record appropriately and send out replacement pins for your local inventory.

Life Loyal Teke

How does Life Loyal Teke benefit Tau Kappa Epsilon?

Your financial support is more crucial than ever as TKE builds leaders and provides life skills for our members to impact their campuses and communities. Your personal commitment and your association's shared effort is a critical part of the movement to grow a stronger culture of philanthropy and enhance the offerings we provide to our collegiate and alumni members!

- Associations are encouraged to take an active role in supporting Life Loyal Teke. Some groups incorporate annual Life Loyal Teke donations as part of their dues structure and remit those funds to headquarters on their members' behalf. Other groups pursue direct promotion campaigns to encourage their alumni to support Life Loyal Teke.
- Our peer fraternities have been able to receive on average \$1.87 million to help achieve their respective missions.

Imagine the impact of doubling or tripling the grant we receive annually from the Foundation. Tax-deductible donations to Life Loyal Teke directly support educational programming for our collegiates and volunteers. The grant provided by the TKE Foundation helps to offset the costs of Regional Leadership Conferences, Charles R. Walgreen Jr. Leadership Academy and the Dr. William V. Muse Alumni Volunteer Academy.

We must evolve our support to provide the resources our Fraternity needs to thrive and your choice to invest in your Fraternity makes a difference.

Learn more at TKE.org/LLT



Tools to Build the Association

- **Database access** is available to the Alumni Association on request by contacting Headquarters. The TKE Headquarters maintains a comprehensive database of every member who has ever been initiated. These lists are provided as an Excel spreadsheet. The database is also synced with our partner, Memberplanet, on a regular basis.
- **Memberplanet** is a third party service that provides communication tools to chartered associations. Tau Kappa Epsilon maintains a partnership that allows Alumni Associations to use the service for group mass email communications, event management, and online payments.
- **Lost Brother Platform** allows members of the Alumni Association to view a list of TKE Alumni that the Headquarters does not have current contact information for. Updating this list will update the master Fraternity database. These updates will show up in the contact lists that you request as well as in the Memberplanet system. [TKE.org/Lost](https://www.tke.org/Lost)
- **MyTKE.org** is TKE's membership portal which allows each member to track their TKE experiences, update contact information and connect with those around them. This in turn will help your association better connect with members and potential members.



Online Presence

Communicate with your membership in a variety of ways for the greatest impact. Utilizing the TKE.org site, your own association's webpage and accounts on all prominent social media platforms will help you grow the association—as long as someone is regularly attending to your online presence. Be sure to use online communication in conjunction with emails, phone calls, texts and paper invitations to get the greatest impact and reach.

- **We provide a website** to each chartered alumni association at no additional charge. Headquarters will register and maintain the URL for your group and set up an automated page similar to the pages that exist for chapters. These TKE branded sites will feed additional information from TKE.org directly to your news feed, so it doesn't get stale. Contact Support@TKE.org for more details.
- **Meeting minutes** should be taken at all of your association meetings. These can be shared directly with members via email. There is no need to post these online or on your social media accounts.
- **Submit Alumni events** at TKE.org/events. This allows us to help promote your event on our website and social media platforms while helping show TKE Nation the range of alumni events taking place throughout the year. All submitted events will also be posted on your association's page.
- **Social Media** sites like Facebook should not be your only communication method. Merely setting up a Facebook event and expecting people to attend typically leads to disappointing results. Setting an event date well in advance is critical. Sharing event details and increasing awareness and reach via social media can help build momentum for your association. The Chapter & Colony Guide to Social Media found at TKE.org/Guides is an excellent outline for when and how to have the greatest impact on social media.
- **Online Conversations** are often misinterpreted, and people can miss elements of humor and sarcasm. You should discourage members from making your social media accounts their personal soapbox. Confront trolls or others making inflammatory posts or comments. Please also help members to understand favored memories from years ago may be okay to discuss in person but are not as appropriate online where they can take on a life of their own with little context. Remember that even on a "closed" or "private" group, things aren't truly private. What is posted in your group does represent the TKE brand and can have a direct impact on chapters—your own and others—and on the Fraternity as a whole.

Investing in TKE's Success

The TKE Foundation is dedicated to the advancement of the Fraternity. The Foundation provides direct financial support each year for headquarters programming, scholarships, and grants to collegiate members. The Foundation is a separate non-profit corporation with 501(c)(3) status; this status allows alumni to make tax-advantaged donations to support the Fraternity and their own chapter.

- **Life Loyal Teke donations** go directly to support educational and leadership programs for both collegiates and alumni Fraters. All associations are asked to support Life Loyal Teke, whether through their own dues structure, additional promotion, and/or fundraising efforts.
- **Special Projects Funds** are maintained by the Foundation for every chapter. Donations to a chapter's fund support collegiates' participation in educational and leadership programs. They may also be used to support the educational components of a house. The distribution of Special Projects Funds is at the discretion of the local Board of Advisors.
- **Chapter scholarships** can be established with the leadership and assistance of alumni associations. The Alumni Association and/or the Board of Advisors can set the criteria and review applications while the Foundation processes donations, handles tax filings and ensures that your donors have an end of year document for tax purposes.





TAU KAPPA EPSILON

— Better Men for a Better World —

Established January 10, 1899, Tau Kappa Epsilon is a men's social fraternity founded on the honest convictions of Love, Charity and Esteem.

For more information,
please visit TKE.org

