

# Pathway to Chapterhood

## **THE ALPHA DELTA PHI SOCIETY**

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Last Revised 3.4.2021  
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## Goals & Overview

This Pathway to Chapterhood Guide is intended for use by Chapter Services, the Board of Governors, and Affiliate Chapters.

The Guide outlines major phases beginning from identifying new chapter development opportunities and ending with granting a charter. The guiding principles in each phase should be considered holistically and on a case-by-case basis.





## Phase 1: Identifying Opportunities

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### I. Founders and the Founding Class

- a. Understanding of, and alignment with, the Society mission's desire to be literary and inclusive
- b. Willingness to invest time in the Society over the course of their university careers and beyond
- c. Willingness to work with their university
- d. Desire to make an impact on their campus that aligns with the Society's mission
- e. Patience, Energy, and Focus: the understanding that this is not a quick and easy process and will require time and work
- f. Number of people relative to similar organizations on campus
- g. Class-year distribution is not skewed towards juniors and seniors

### II. School and Administration

- a. Culture of healthy greek life
- b. Clear willingness to welcome a gender inclusive greek organization
- c. Way to categorize and oversee a gender inclusive greek organization, or will create one
- d. Permit Chapter to select its own members
- e. Support recognized organizations, providing
  - i. Funding
  - ii. Ability to advertise on campus
  - iii. Potential for housing, meeting space, or storage space
- f. Lack of similar organizations on campus

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### **III. Society**

- a. Proximity to graduate members who are willing to be present and assist
- b. Proximity to other chapters which are willing to be present and assist
- c. Cost of travel and other funding needed, and availability of those funds

### **IV. Decision to Start an Affiliate**

- a. Procedural - decisions are made by the Board, informed by the recommendation of the Director of New Chapter Development
- b. Substantive - the Board should weigh all of the above listed-factors from sections I, II, and III



## Phase 2: Starting an Affiliate

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### **I. Initial information Presented**

- a. Monetary commitment (initiation fee and insurance)
- b. Time commitment

### **II. New Member Educators**

- a. Selected by Director of New Chapter Development, considering
  - i. Desire to be a New Member Educator
  - ii. Willingness to commit time, energy, and travel
    - 1. One semester commitment (multi-year commitment a bonus)
    - 2. Travel a high priority
  - iii. Good individually and work well together as a team
  - iv. Diversity: traditions, experiences, chapters, identities

### **III. Society Chapter Advisors**

- a. Selected by Director of New Chapter Development, considering
  - i. Desire to be a Chapter Advisor
  - ii. Willingness to commit time, energy, and travel
    - 1. Multi-year commitment
    - 2. Travel a benefit, but not a priority
  - iii. Good individually and work well together as a team
  - iv. Diversity: traditions and experiences, chapters, identities

### **IV. Faculty Advisor**

- a. ADPS or ADP graduate member a plus
  - b. Long term commitment is preferred - tenured, tenured track, or plans to remain at school a plus
  - c. Valuable, even if not required by the school
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## **V. Recognition as a School Organization**

- a. Determine school's requirements for recognition
- b. Determine if recognition is required, what benefits it provides
- c. Determine under which department is ADPS will be categorized
- d. Select the Society's point person
- e. Contact a point person in the administration or in the department
- f. Apply as recognized organization

## **VI. New Member Education of Founding Class**

- a. Comply with school requirements
- b. Set time frame
- c. Reserve meeting space
- d. In person vs. remote
- e. Availability of volunteers
- f. Budget
  - i. Determined by Director of New Chapter Development
- g. Big-Little pairs selected by New Member Educators
  - i. Desire to be a Big
  - ii. Willingness to commit time, energy, and travel
    - 1. One semester commitment (multi-year commitment a bonus)
    - 2. Travel a benefit, but not a priority
  - iii. Diversity: traditions, experiences, chapters, identities

## **VII. Initiation**

- a. Location - school, nearby location, or nearby chapter
- b. Date - determined by New Member Educators
- c. Budget - determined by Director of New Chapter Development
- d. Personnel - selected by New Member Educators and Director of New Chapter Development
- e. Gifts presented after the founding initiation ceremony
  - i. Green Book from Society National (Green Book contains governing documents and Ceremony scripts)
  - ii. Society Flag from Society National
  - iii. Pledge Traditions Book from Society National
  - iv. Ceremony Decorations from New Member Educators and Advisors
  - v. [Optional/Encouraged] Gifts from Bigs for Littles



## Phase 3: Setting up an Affiliate Chapter

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### **I. Establish Governance Structures**

- a. Provide a range of existing examples and best practices
- b. Select officers and leaders
- c. Create a budget (with Society Treasurer)
- d. Establish chapter practices
- e. Learn to run a chapter meeting
- f. Draft bylaws
- g. Establish efficient communication structures

### **II. Building a Community**

- a. Establishing the Ideals of Siblinghood
- b. Regularly scheduled social events
- c. Spontaneous socializing

### **III. Recruitment**

- a. Comply with school guidelines on timing, student eligibility, and types of events
- b. Review a range of existing examples and best practices from the Society and other chapters (UP drive and Society drive)
- c. Find examples and best practices from similar organizations on campus
- d. Work with UP, New Chapter Development, Chapter Services to create and execute the Recruitment plan
- e. Society should send volunteers if allowed by the school
- f. Analyze recruitment practices after recruitment period has ended

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#### **IV. New Member Education**

- a. Review school guidelines on timing, who can participate, types of events
- b. Review a range of existing examples and best practices from the Society and other chapters (UP drive and Society drive)
- c. Work with UP, New Chapter Development, Chapter Services to create and execute a New Member Education plan
- d. Society should send volunteers if allowed by the school
- e. Analyze practices after New Member Education period has ended

#### **V. Physical Space on Campus**

- a. Determine what other organizations use on campus
- b. Compare with similar Society chapters
- c. Evaluate what the university provides

#### **VI. Society Integration**

- a. Attend UP calls
- b. Attend Caucus
- c. Attend Convention
- d. Interchapter visits
- e. Chapter Services Check-ins



## Phase 4: Supporting an Affiliate Chapter

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### **I. Financial Assistance**

- a. Chapters may apply for grants from Chapter Services
- b. Financial Aid for Society initiation fee is available to all Society members
- c. Insurance is \$110 per member annually, but new affiliate chapters pay (0%, 33%, and 67% their first 3 years)
- d. New Member Insurance is \$55 at Initiation, but new affiliate chapters pay (0%, 33%, and 67% their first 3 years)
- e. Beyond the first 3 years financial assistance for insurance may be available at the discretion of the Society Treasurer
- f. Chapter Services will check-in semesterly to discuss chapter's current financial needs

### **II. Recruitment Assistance**

- a. Access to the repository of recruitment promotional materials from the Society and other chapters (UP drive and Society drive)
- b. Access to the repository of recruitment best practices from the Society and other chapters (UP drive and Society drive)
- c. Access to the Society's information sheets and/or FAQs
- d. Financial assistance for New Member Education may be available at the discretion of Chapter Services
- e. Chapter Advisors will check-in regularly to discuss chapter's Recruitment process
- f. Chapter Services will check-in semesterly to discuss chapter's recruitment process and goals (events, class size, etc.)

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### **III. New Member Education Assistance**

- a. Access to the repository of new member education materials, including the Society Pledge Manual, from the Society and other chapters (UP drive and Society drive)
- b. Access to the repository of new member education best practices, including the Society Pledge Manual, from the Society and other chapters (UP drive and Society drive)
- c. Initiations are overseen by a representative of the Board of Governors
- d. Financial assistance for New Member Education may be available at the discretion of Chapter Services
- e. Chapter Advisors will check-in regularly to discuss chapter's New Member Education process
- f. Chapter Services will check-in semesterly to discuss chapter's New Member Education process

### **IV. Governance Assistance**

- a. Access to the repository of governance materials and best practices, such as by-laws and missives, from the Society and other chapters (UP drive and Society drive)
- b. Access to leadership training
- c. Chapter Advisors will check-in regularly to discuss chapter's governance
- d. Chapter Services will check-in semesterly to discuss chapter's governance
- e. The Society Treasurer is available to consult on budgeting and financial matters, including setting dues

### **V. University Relations**

- a. Access to the repository of best practices for dealing with university administration from the Society and other chapters (UP drive and Society drive)
- b. Upon request, Society representatives can call, email, or meet with school administrators

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## **VI. Developing and Maintaining a Sense of Community**

- a. Emphasizing the Ideals of Siblinghood and the Society's stated mission
- b. Encouraging regularly scheduled social events and spontaneous socializing
- c. Financial assistance for social activities aimed at community building may be available at the discretion of Chapter Services
- d. Access to the repository of best practices for building communities from the Society and other chapters (UP drive and Society drive)
- e. Chapter Advisors will check-in regularly to discuss chapter's sense of community
- f. Chapter Services will check-in semesterly to discuss chapter's sense of community

## **VII. Progressing Towards Charter**

- a. Chapter Services will provide feedback semesterly on the affiliate's progress towards receiving its charter
- b. This feedback will be included in reports that Chapter Services makes to the Board

## **VIII. Reporting**

- a. Chapter Advisors will check-in regularly
- b. These check-ins should occur at least monthly
- c. Chapter Advisors are encouraged to attend Chapter meetings either in person or remotely
- d. Meeting minutes will be made available to the Chapter Advisors
- e. Chapter Services will check-in semesterly
- f. Chapter Services will report regularly to the Board of Governors on the status of each affiliate chapter



## Phase 5: Granting the Charter

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**These metrics are used to determine that an Affiliate Chapter is ready to become a Chartered Chapter:**

### **I. Recruitment**

- a. A series of successful recruitments:
  - i. Initial growth until stable membership size is reached and maintained
- b. Ability to analyze past recruitments and implement lessons learned
- c. Bid voting in keeping with Society standards of respect and non-discrimination

### **II. New Member Education**

- a. Demonstrated commitment to anti-hazing policy and principles
- b. Successful, sustainable new member education processes
  - i. New members learn and retain material required by the Society
  - ii. New members learn additional material required by the Chapter
  - iii. New members form bonds with already initiated members, the Chapter, and the Society
  - iv. New members and the Chapter engage in fun and safe activities, in addition to lessons (not just lectures and rote memorization)
  - v. New members have opportunities to practice the Ideals of Siblinghood and the Society's stated mission
- c. Ability to analyze past new member education processes and implement lessons learned
- d. Mechanism to remove pledges both voluntarily and involuntarily

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### **III. Governance**

- a. Demonstrated ability to successfully run orderly, respectful, and productive meetings
- b. Established methods to challenge decisions in keeping with the Ideals of Siblinghood
- c. Demonstrated ability to successfully transition leadership
- d. Demonstrated commitment to maintaining and updating by-laws, transition guides, and other aspects of institutional knowledge
- e. Established disciplinary processes that are in keeping with the Ideals of Siblinghood, including mechanisms by which to disaffiliate/expel members

### **IV. Finances**

- a. Budget
  - i. Ability to develop a budget each budgetary cycle (either semesterly or annually)
  - ii. Ability to debate and pass a budget each budgetary cycle (including the budgeting for insurance payments)
  - iii. Ability to stick to the established budget (or amend if necessary)
  - iv. Demonstrated good judgement in budgeting and spending
- b. Dues
  - i. Ability to set and collect dues
  - ii. Ability to discipline members in case of lack of dues payments
- c. Other Sources of Income
  - i. If necessary, demonstrated sustainable fundraising
  - ii. Ability to apply and obtain national level funding
- d. Bank Account
  - i. Proper oversight established
  - ii. Sufficient funds to withstand exogenous shocks

### **V. Community**

- a. Upholds and promotes the ideals of the Society and the Society's stated mission
  - b. Have fun together (e.g. attend each other's sports/art/theater/other events, hang out outside of official ADPS events, support each other)
  - c. Repeated group social events
  - d. Safe, supportive environment for all members (undergrad, grad, and from other chapters)
  - e. Create a space on campus that is welcoming and supportive to all in the campus community
  - f. Create a space that supports learning and the pursuit of knowledge in all its forms
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- g. Demonstration of commitment to member safety including adherence to all University regulations regarding student safety, security, and comfort

## **VI. National Society Participation**

- a. Attendance/participation at Convention
- b. Attendance/participation on Undergraduate Parliament calls
- c. Attendance/participation in undergraduate caucus
- d. Participating in Literary Competition, SELEF scholarships
- e. Traveling/visiting/hosting other chapters

## **VII. Communication with Advisors, Alumni, and National**

- a. Consistent communication with chapter advisors (at least monthly)
- b. Consistent communication with chapter alumni
  - i. Communicate needs, invitations, maintaining connections to members when they graduate
  - ii. Communicate with graduate chapter
- c. Consistent communication with Chapter Services (at least semesterly)
- d. Consistent communication with the Undergraduate Parliament (at least one representative on all UP calls)

## **VIII. University Relations**

- a. Awareness of University regulations and restrictions surrounding ADPS activities
- b. Adaptability to University standards/requirements
- c. Maintain good relations with the University and faculty advisors
- d. Good academic standing according to the rules of the University

**These are the ways in which metrics will be used by Advisors and Affiliates:**

### **I. Communicating Metrics to Affiliate Chapters**

- a. Chapter Advisors and/or Chapter Services introduce and explain these metrics to the founding class
- b. Chapter Advisors discuss progress on the metrics with the Affiliate Chapter during check-ins
- c. Chapter Services discuss progress on the metrics with the Affiliate Chapter during check-ins
- d. New Chapter Development and Chapter Services may communicate with the school and provide these metrics as needed

### **II. Timing**

- a. Each Affiliate Chapter will take a different amount of time to apply for and receive their charter based on their individual situation and progress on these metrics
  - b. Typically, Affiliate Chapters apply for their Charter three to five
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### **III. Charter Application**

- a. Affiliate Chapters notify their Chapter Advisors and Chapter Services that they intend to apply for a charter
- b. Affiliate Chapters complete an application demonstrating their progress on the metrics, working with their Chapter Advisors and Chapter Services
- c. Affiliate Chapters submit the application to the Board of Governors and then to the Convention

### **IV. Charter Application Approval**

- a. The Affiliate Chapter presents its application for a Charter to the Board of Governors
- b. The Board of Governors votes whether to recommend granting the Charter by a two-thirds vote
- c. The Board of Governors presents its recommendation to the Convention
- d. The Affiliate Chapter makes itself available to the Convention
- e. The Convention votes to approve the Charter subject to the rules of the Convention
- f. Once the Charter is granted, a physical charter and a gavel is purchased by the Director of New Chapter Development and is presented to the Chapter in consultation with Chapter Alumni and Chapter Advisors



## Considerations for Closing an Affiliate

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**These metrics are used to determine if an Affiliate Chapter is in danger of failing:**

### **I. Recruitment**

- a. Inability to maintain stable recruitment numbers despite assistance from the Society.
- b. Repeated instances of Bid Voting violating Society Standards of respect and non-discrimination.
- c. Recruitment process consistently violates University and Society policies.

### **II. New Member Education**

- a. New member education process consistently violates anti-hazing policy and principles.
- b. New members consistently demonstrate lack of knowledge about basic required materials.
- c. Consistent difficult retaining new members through the education process.
- d. Lack of commitment to the new member education process.

### **III. Governance**

- a. Demonstrated lack of commitment to chapter governance, including holding meetings
  - b. Inability to successfully run orderly, respectful, and productive meetings
  - c. Inability to challenge decisions in keeping with the Ideals of Siblinghood
  - d. Inability to successfully transition leadership
  - e. Membership, both generally and individually, does not have a voice in chapter decisions and discussions
  - f. Misuse of procedural mechanisms, aspects of meetings, written bylaws and other institutional knowledge to perpetuate discrimination and other practices not in keeping with the Ideals of Siblinghood
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## **IV. Finances**

- a. Budget
  - i. Consistent inability to develop a budget each budgetary cycle (either semesterly or annually)
  - ii. Consistent inability to debate and pass a budget each budgetary cycle (including the budgeting for insurance payments)
  - iii. Consistent inability to stick to the established budget (or too frequently amending the budget)
  - iv. Demonstrated poor judgement in budgeting and spending
  - v. Inability to make progress towards financial self-sufficiency
- b. Dues
  - i. Consistent failure to set and/or collect dues
  - ii. Consistent failure to set appropriate dues
  - iii. Membership consistently ignores the set dues with impunity
- c. Bank Account
  - i. No proper oversight established
  - ii. Insufficient funds to withstand exogenous shocks
  - iii. Repeated mismanagement, misuse, or abuse of bank account

## **V. Community**

- a. Lack of respect for members and new members, the ideals of the Society, and the Society's stated mission
- b. Extremely low morale and demonstrated lack of community support
- c. Significant portion of membership goes inactive
- d. Perpetuation of an environment in which members feel unsafe, unsupported, unwelcome, or unwanted
- e. Perpetuation of an environment in which members feel required to act disingenuously or break university and/or Society policies
- f. Demonstration of disregard for member safety including nonobservance of University regulations regarding student safety, security, and comfort

## **VI. National Society Participation**

- a. Repeatedly not attending or participating at Convention
- b. Repeatedly not attending or participating on Undergraduate Parliament calls
- c. Repeatedly not attending or participating in undergraduate caucus
- d. Consistently demonstrating unwelcoming behavior towards Siblings from other chapters

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## **VII. Communication with Advisors, Alumni, National**

- a. Repeated lack of communication with chapter advisors
- b. Repeated lack of communication with chapter alumni
- c. Repeated lack of communication with Chapter Services
- d. Repeated lack of communication with the Undergraduate Parliament
- e. Actively ignoring communication from Advisors, Alumni, and the Society
- f. Actively misleading Advisors, Alumni, and the Society

## **VIII. University Relations**

- a. Disregard for University regulations and restrictions surrounding chapter activities
- b. Failure to maintain good academic standing according to the rules of the University

**These are the ways that Advisors communicate metrics to Affiliates, and the way that the Society should procedurally pursue closing an Affiliate:**

### **I. Communicating Metrics to Affiliate Chapters**

- a. Chapter Advisors discuss concerns regarding the metrics with the Affiliate Chapter during check-ins
- b. Chapter Services discuss concerns regarding the metrics with the Affiliate Chapter during check-ins
- c. Chapter Advisors and Chapter Services include Chapter Alumni in these discussions if there continue to be concerns regarding the metrics
- d. The Board of Governors or its designee(s) discusses concerns regarding the metrics with the Affiliate Chapter upon escalation from Chapter Advisors and Chapter Services

### **II. Society Response to Concerns**

- a. Chapter Advisors, Chapter Services, and Chapter Alumni work with the Affiliate Chapter to address these concerns
- b. Board of Governors establishes a Task Force dedicated to working with the Affiliate Chapter to address these concerns
  - i. The Task Force shall either include or be in consultation with chapter advisors, and Chapter Services,
  - ii. The Task Force shall include a representative of the alumni of the Affiliate in question and be in communication with all chapter alumni

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### **III. How the Board of Governors Closes an Affiliate Chapter**

- a. The Task Force makes a recommendation to the Board of Governors based on their work and communication with the Affiliate Chapter in question to close it. The membership of the Affiliate Chapter may also request that the Board of Governors close the chapter.
- b. Based on that recommendation, the Board of Governors decides to close the Affiliate Chapter based on the Board of Governors' by-laws
- c. The President of the Society notifies the Affiliate Chapter of the Board's decision both verbally and in writing
  - i. This includes informing the former Affiliate Chapter members about the new restrictions around the use of signs, symbols, letters and other Society identifying materials
  - ii. Distinctions such as that the former members of the Affiliate are still part of the Society but that there is no longer a legally recognized Society group at the University will be made
- d. The President of the Society notifies the University of the Board's decision both verbally and in writing
- e. A representative of the Society shall collect all Society ceremonial and governing materials

### **IV. Lessons Learned**

- a. The Board of Governors and the Task Force evaluate the new chapter creation development for the Affiliate Chapter to identify lessons to be learned from the closure
- b. These lessons are incorporated into the new chapter development process and Chapter Services' best practices