



LIEUTENANT MASTERS ACADEMY

ATTENDEE GUIDE

REVISED JANUARY 2021

CONCLAVE 2021

NAME

SCHOOL

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IMPORTANT LINKS

The following links are to videos on our YouTube page and other AEPi resources that will help you in your role as Lieutenant Master! Check them out:

- [Motivating the Middle](#)
- [Public Speaking](#)
- [Leadership Without a Title](#)
- [Remote Philanthropy Video](#)
- [Sponsorship Levels Example](#)
- [AEPi Example Virtual Chapter Calendar](#)
- [Example Application for Minor Board](#)
- [Philanthropy Guide](#)
- [CrowdChange 101/Virtual Philanthropy](#)

WELCOME TO CONCLAVE

Dear Brother Lieutenant Master,

Welcome to Alpha Epsilon Pi's first-ever fully virtual Conclave and Lieutenant Masters Academy! I hope you and your Brothers are safe and excited for the upcoming programs.

This conference is a time where brand new as well as experienced Lieutenant Masters come together to further their AEPi education and to strengthen their chapters by networking with other Brothers and staff from around the world. Remember, you get out what you put in, so I encourage you to introduce yourself to other Brothers so you can build relationships and get the most out of your time attending our virtual Lieutenant Master Academy.

As a Lieutenant Master, it is critical that you are attentive and open-minded. If you are not taking this information back to your chapters, no one will. Additionally, if you see other Brothers struggling, you should take initiative and help them get back up to speed. We are all in this together.

Once again, I welcome you to AEPi's virtual Lieutenant Masters Academy. I firmly believe you and your chapter will be in a better place after the coming weeks due to your dedication to your chapter and the International Fraternity. Remember that everyone attending wants to learn and network just like you. Have fun and get as much from this opportunity as possible.

Fraternally,



Jim Fleischer
Chief Executive Officer
Alpha Epsilon Pi Fraternity



LETTER FROM THE SUPREME MASTER

Dear Brother Lieutenant Master,

On behalf of the Supreme Board of Governors, welcome to AEPi International's 2021 Conclave Season.

Obviously, this year's conclave is significantly different than any we have done before. I urge you, though, to take advantage of the opportunities afforded here to better yourselves and your chapter. Conclave is a phenomenal opportunity for Brothers to learn how to become a better leader in your chapter. These lessons will serve you well as you progress on your campus and community path.

We cannot be together in person and, because of that 2021 AEPi conclave attendees may miss out on the opportunity to meet fraternity Brothers from other chapters and network with AEPi volunteers and staff.

To me, this is one of the most important aspects of conclave. The relationships you make at conclave, often last the rest of your life. Our staff has tried to develop programs which will give you the chance to, at least virtually make these connections. Please take advantage of these networking opportunities as they will be both valuable and fulfilling.

The past year has been difficult for all of us. But our fraternity is weathering the pandemic and focusing our efforts on core values and programs. If I, or anyone on the Supreme Board of Governors, can assist you or your chapter in any way, please let me know.

Stay safe and healthy, get vaccinated if you can, and I look forward to seeing you in person – in the near future, Convention 2021 in Orlando. Baruch Hashem.

Fraternally,



Jason Oshins
Supreme Master
Alpha Epsilon Pi Fraternity

Email: joshins@aepi.org



JANUARY SCHEDULE

**all session times are in Eastern Standard Time (EST)*

MONDAY, JANUARY 11

Playing to Your Strengths | 8:00 PM

Assistant Director of Jewish and Leadership Programming, Ethan White

As Lieutenant Master, you're the chapter master's right hand man. In this sessions, we'll discuss the basics of your position, and what it takes to act as a Director of Programming for your Chapter.

TUESDAY, JANUARY 12

AEPi 101 | 6:00 PM

AEPi International Staff

This session will reinforce ideals and values of what it means to be an AEPi Brother. Additionally, staff and volunteers will discuss fundamental practices and resources for new members to keep close to them throughout their entire AEPi experience. **While this session is meant for new members, all are welcome.**

From Bid Room to Board Room | 8:00 PM

AEPi International Staff

Join AEPi alumnus and veteran entrepreneur, Daniel Debow (Western, 1995), as he helps our Brothers unlock the key to translating your Fraternity leadership experiences into the workplace.

MONDAY, JANUARY 18

Dynamic Leadership | 8:00 PM

AEPi Foundation Director, Michael A. Leven

Join us for an intimate conversation with Brother Michael A. Leven (Tufts, 1959) on the most important lessons and habits needed to take on the role of Lieutenant Master. Brother Leven is the Honorary Dean and co-founder of AEPi's Leven Leadership Institute. As an undergraduate, he was chapter Master, Lieutenant Master and Rush Chair. He has also had a six decades long career in the hospitality industry, leading companies like Las Vegas Sands, Days Inn, Intercontinental Hotel Group and the Georgia Aquarium.

TUESDAY, JANUARY 19

Rush Rush Rush | 6:00 PM

AEPi International Staff

Rush is the lifeblood of the fraternity and, without it, your chapter would cease to exist. Join us for this session to learn how to produce better rush results in terms of quantity AND quality. **While this session is meant for new members, all are welcome.**

JANUARY SCHEDULE

*all session times are in Eastern Standard Time (EST)

TUESDAY, JANUARY 19

How to Run an Effective Meeting | 8:00 PM

AEPi International Staff

Have you ever asked yourself how you can make chapter meetings more effective and less time-consuming? Join us to learn best practices to produce valuable meetings that your Brothers will love to be a part of.

MONDAY, JANUARY 25

Minor Board: Planning & Executing Events | 8:00 PM

AEPi International Staff

We'll wrap up the Lieutenant Masters Academy by covering minor board management, operations, and the basics behind creating a calendar and coming up with new events for the chapter.

TUESDAY, JANUARY 26

AEPi: The Value Added Fraternity | 6:00 PM

AEPi International Staff

For far too long, many chapters have been looking at AEPi all wrong. In this session, we dive deep into what a balanced fraternity could look like and how it will benefit each and every member who joins. **While this session is meant for new members, all are welcome.**

Reimagining New Member Education | 8:00 PM

AEPi International Staff

In this session, we'll encourage open conversation amongst Brothers on their shared experiences and best practices on how to program New Member education during a global pandemic.

FEBRUARY SCHEDULE

*all session times are in Eastern Standard Time (EST)

TUESDAY, FEBRUARY 2

Minor Board: The Return on Your Investment | 6:00 PM

AEPi International Staff

Work in groups with other AEPi Brothers to add critical programming to your chapter that can change a semester from good to great. **While this session is meant for new members, all are welcome.**

Keeping the Peace: The Critical Role of a Brother at Large | 8:00 PM

Educational Leadership Consultant, Matthew Shipley

A key role in the chapter, Brother at Large works towards good harmony and a sense of security amongst the Brothers in your chapter. Hear about the ins and outs of this important role.

TUESDAY, FEBRUARY 9

Introduction to Health & Safety | 6:00 PM

AEPi International Staff

Every year, members continue to develop safer practices that will ensure the longevity of their chapter. This session will discuss multiple aspects of Health and Safety including, but not limited to, sexual abuse prevention, hazing prevention, alcohol and other drug abuse prevention, bystander intervention and more. **While this session is meant for new members, all are welcome.**

Public Speaking and Persuasive Presentations | 8:00 PM

AEPi International Staff

Whether it's addressing the chapter in your weekly meeting or giving a presentation to the CEO of a company, public speaking and presentation skills are a necessity. Join us for this session to learn tips and tricks on grabbing your audience's attention.

TUESDAY, FEBRUARY 16

Leading Your Chapter: Stepping up on E-board | 6:00 PM

AEPi International Staff

Each Brother in AEPi serves a critical role in the chapter. Many will eventually become executive board members but have to work their way up the ranks to get there. We will discuss best practices to stand out as a leader, become as knowledgeable as possible, and create long-lasting, positive change in your chapter. **While this session is meant for new members, all are welcome.**

AEPi Talks | 8:00 PM

AEPi International Staff

Our Leven Fellows came up with their own unique presentations for this year's #AEPiConclave. Each fellow presented their idea to AEPi International staff, and one was chosen to be presented to you.

THE MISSION OF ALPHA EPSILON PI

The mission of Alpha Epsilon Pi is to provide education, resources and training to the future leaders of the world's Jewish communities. This mission is demonstrated every day through acts of brotherhood, Tzedakah (charity), social awareness and support for Jewish communities and Israel.

Alpha Epsilon Pi was founded to provide opportunities for the Jewish college man seeking the best possible college and fraternity experience. We have maintained the integrity of our purpose by strengthening our ties to the Jewish community and serving as a link between high school and career.

Our heritage stems from one source: young Jewish men banding together in allegiance. The fraternity can be a home away from home, providing the same stabilizing and guiding values that students previously gained from their families. Jewish students search out Alpha Epsilon Pi because it is a Jewish fraternity. In the fraternity's 105-year history, more than 102,000 men have worn the badge of Alpha Epsilon Pi and each year, approximately 3,000 undergraduates perform the Ritual of Initiation, which remains the same ritual adopted decades ago.

Perhaps of greater importance, Alpha Epsilon Pi provides education, resources and training to develop leadership for the future of the Jewish community. Tomorrow's Jewish leaders are in our chapters today. These are the young men who must be counted upon to support Jewish causes and to prepare to be one of tomorrow's Jewish leaders, so that they may aid themselves, their family, their community and their people.

Throughout our history, the fraternity setting has served as a "learning laboratory," a testing ground for young men who later become leaders in business, education, government, religion and science. A goal of our fraternity is to help each student to develop character, responsibility and a proper set of values through living together in brotherhood. Alpha Epsilon Pi prepares young men for their role in life as responsible citizens.

Therefore, our basic purpose is to provide the opportunity for a Jewish man to be able to join a Jewish organization whose purpose is not specifically religious, but rather social and cultural in nature. Alpha Epsilon Pi is a Jewish fraternity and brotherhood in Alpha Epsilon Pi is open to all who are willing to espouse its values and mission.

ALPHA EPSILON PI HEALTH AND SAFETY POLICY

Produced by Alpha Epsilon Pi Fraternity, Inc.

AEPI HEALTH AND SAFETY POLICY

Alpha Epsilon Pi strives to provide a safe and respectful environment for all of our Brothers, guests, neighbors and communities at all times. To do so, we regularly discuss health & safety with all chapter members and, especially, each chapter's leadership. This is done throughout the academic year through ongoing communications, meetings with staff members and volunteers and regular fraternity-sponsored events such as our annual International Convention and regional conclaves.

AEPI's chapters and members follow the Health and Safety Policy below.

As a fraternity dedicated to developing leadership for Jewish communities and based in Jewish values, we take seriously our obligation to "Love Your Neighbor as Yourself." As a Jewish fraternity, one of the values of our teachings we hold most important is that all human beings are fashioned b'tselm Elohim, in the image of G-d.

GENERAL CONDUCT

During their initiation ceremony each member took an oath to act in accordance with the ideals, oath, and ritual of the Alpha Epsilon Pi Fraternity. As such, Alpha Epsilon Pi expects that members act kindly and respectfully toward others. All members are expected to maintain a culture and environment where they and their fellow chapter members can achieve their potential.

Members shall not infringe on others rights of property, privacy, and peaceful enjoyment. Members shall strive to be good neighbors and community members; which shall include, but not be limited to, compliance with Fraternity policy, laws and ordinances, and reasonable University rules and regulations.

CONFLICT RESOLUTION

Members shall endeavor to promptly and peacefully resolve any and all interpersonal conflicts with others using all reasonable courses of action including, but not limited to, personal interaction, use of Chapter processes such as mediation by the Brother-at-Large and Judicial Board, use of University mediation services, and engagement of Alpha Epsilon Pi Fraternity staff.

GENERAL SAFETY

Members shall strive to keep themselves and others out of harm's way and shall not engage in any excessively risky behaviors, nor shall they allow their guests to engage in these behaviors.

Members are expected to maintain safe, secure, and healthy environments for their fellow members and guests.

Members are expected to comply with local building and fire codes and exercise care with regard to security and general safety. They shall make good faith efforts to promote fire safety in their facilities and in any venues that they utilize for chapter functions.

HAZING POLICY

Members, New Members, Alumni, and guests must not permit, encourage, coerce, glorify or participate in Hazing or abuse of members, new members, potential members, or guests.

AEPI HEALTH AND SAFETY POLICY

The term “hazing” means any intentional, knowing, or reckless act committed by a person, whether individually or in concert with other persons, against any individual or group of individuals, regardless of affiliation, whether or not committed on chapter property, for the purpose of recruiting, joining, new member education, initiating, admitting, affiliating, or for the purpose of retaining membership in an organization that causes an individual or group of individuals to do any of the following, regardless of a person’s willingness to participate:

- Be coerced to violate federal, state, provincial, local law, or organizational policy.
- Be coerced to consume any food, liquid, alcoholic liquid, drug, or other substance in any non-customary manner which subjects the individual or group of individuals to a substantial risk of emotional or physical harm which includes but not limited to sickness, vomiting, intoxication, or unconsciousness.
- Endure brutality of a physical nature, including but not limited to whipping, beating, paddling, branding, dangerous physical activity, or exposure to elements or endure threats of such conduct that results in mental or physical harm.
- Endure brutality of a mental nature, including but not limited to activity adversely affecting the mental health or dignity of the individual, sleep deprivation, exclusion from social contact or conduct that could result in extreme embarrassment or endure threats of such conduct that results in mental or physical harm.
- Endure any other activity which adversely affects the health and safety of an individual, including but not limited to the disruption of academic performance or class attendance, required designated driving programs, line ups, calisthenics, or personal, physical, or financial servitude.

SEXUAL MISCONDUCT

Members, New Members, and guests must comply with all federal, state, provincial, and local laws related to sexual misconduct. This is including, but not limited to, definitions around consent, sexual violence, sexual harassment, domestic violence, dating violence, stalking, and sexual exploitation.

The employment or use of strippers, exotic dancers or similar, whether professional or amateur, at any fraternity activity or event as defined in this policy is prohibited.

ASSAULT AND BATTERY

No chapter, member or guest shall engage in assault and battery, as defined in the state statutes in which they are located nor shall they engage in or encourage others to engage in violence against others nor threaten violence against others.

FIREARMS, EXPLOSIVE OR INCENDIARY DEVICES

The Chapter and its Members, New Members, and Guests must comply with all federal, state, provincial, local laws and campus policy as it relates to firearms or explosive or incendiary devices.

No weapons of any kind are ever permitted in a chapter facility or at a chapter event, whether owned or obtained legally or not. This includes, but is not limited to, guns, flame throwers, swords, axes, hatchets, knives (except eating and cooking utensils), ammunition, explosives, bb guns, air rifles, slingshots, bows and arrows, pepper spray, Tasers, or anything else which might be considered

AEPI HEALTH AND SAFETY POLICY

a weapon.

ALCOHOL AND DRUGS

In any activity or event sponsored or endorsed by the organization:

- Members, and guests must comply with all federal, state, provincial, and local laws. No person under the legal drinking age may possess, consume, provide, manufacture, sell or be provided alcoholic beverages.
- Members, and guests must follow the federal law regarding illegal drugs and controlled substances. No person may possess, use, provide, distribute, sell, and/or manufacture illegal drugs or other controlled substances.
- Alcoholic beverages must either be: (1) provided and sold on a per-drink basis by a licensed and insured third-party vendor (e.g., restaurant, bar, caterer, etc.); or (2) brought by individual members and guests through a bring your own beverage ("BYOB") system.
- The presence of alcohol products above 15% alcohol by volume ("ABV") is prohibited on any chapter premises or at any event except when served at an event outside of the chapter premises by a licensed and insured third-party vendor.
- Common sources of alcohol, including bulk quantities, which are not being served by a licensed and insured third party vendor, are prohibited (i.e., amounts of alcohol greater than what a reasonable person should consume over the duration of an event).
- Alcoholic beverages must not be purchased with chapter funds or funds pooled by members or guests (e.g., admission fees, cover fees, collecting funds through digital apps, etc.).
- A chapter must not co-host or cosponsor, or in any way participate in, an activity or event with another group or entity that purchases or provides alcohol, illegal drugs or controlled substances.
- A Chapter must not co-host or cosponsor an event with a bar, event promoter, or alcohol distributor; however, a chapter may rent a bar, restaurant, or other licensed and insured third-party vendor to host a chapter event.
- Attendance by non-members at any event where alcohol is present must be by invitation only, and the Chapter must utilize a guest list system. Attendance at events with alcohol is limited to a guest-to-member ratio not to exceed 3:1 and must not exceed local fire or building code capacity of the chapter premises or host venue.
- Any event or activity related to the new member joining process (e.g., recruitment, intake, rush, etc.) must be substance free. No alcohol or drugs may be present if the event or activity is related to new member activities, meetings, or initiation into a chapter, including but not limited to "bid night," "Big/Little" events or activities, "family" events or activities, and any ritual or ceremony.
- Members, or guests must not permit, encourage, coerce, glorify or participate in any activities involving the rapid consumption of alcohol, such as drinking games.

RETALIATION

Retaliation against any individual – members and non-members – for reporting, inquiring, or cooperating with a report around a violation of the Risk Management Policy is prohibited.

Retaliation is any action, statement, or behavior that is designed to punish an individual for filing a compliance report, cooperating with a compliance investigation, seeking guidance regarding a

AEPI HEALTH AND SAFETY POLICY

compliance concern, or to deter one from taking such action.

POLICY DISTRIBUTION

Alpha Epsilon Pi shall distribute its Health and Safety Policy to its members on an annual basis. A copy of the Health and Safety Policy is available on www.aepi.org/health-and-safety.

GOOD SAMARITAN POLICY

"I am my Brothers' keeper." A Brother's conduct should proceed from Jewish teachings and ethics, and a sense of goodwill and brotherhood. It is the policy of the fraternity that a Brother should immediately seek emergency assistance when an individual's appearance or conduct would reasonably cause one to be concerned for another person's well-being. A Brother who acts as a "Good Samaritan" shall receive amnesty from expulsion by the fraternity, providing that his actions occurred before emergency responders were otherwise made aware of the situation.

DRIVING AND MOTOR VEHICLE OPERATION

Whenever possible chapters and members should utilize public transportation or transport service (buses, trains, cabs, etc.) when transportation is necessary for fraternity events or activities.

Any individual who drives or otherwise provides transportation in conjunction with Alpha Epsilon Pi activities shall obey all applicable motor vehicle laws, including, but not limited to, those concerning vehicle safety, vehicle operation, insurance and the transportation and consumption of alcoholic beverages. Operators must ensure that vehicles are roadworthy, in proper operating condition, not overloaded and are driven in a safe manner. Operators must ensure that all occupants are properly utilizing seatbelts and other safety equipment.

All members shall only drive motor vehicles for which they are licensed, endorsed, and insured to legally operate and shall not lend or allow others to use vehicles if they do not meet these standards. Members shall not operate any vehicle(s) which require a Commercial Driver's License (CDL), pilot's license of any kind, motorcycle license, or other specialty endorsements as part of any chapter activity nor shall they utilize vehicles for towing or hauling unsecured loads.

All use of personal vehicles shall be strictly voluntary and the sole responsibility of the vehicle owner/operator. Any claims that may arise are the sole responsibility of the vehicle owner and/or driver. Drivers and vehicle owners should be advised that the fraternity does not provide insurance for nor does it assume any liability for claims or injuries to persons, damage to property, or damage to vehicles arising from the use of their personal vehicles in connection with any fraternity activities. All drivers should agree and provide written proof that they have personal automobile insurance with limits that comply with local law on any vehicle which they own or use

Members shall not operate, park, store, or allow others to park or store any motorized vehicle(s) inside of any fraternity premises at any time.

Where chapters maintain "Safe Driver", "Sober Driver", or "Designated Driver" activities, participation should be on a strictly voluntary basis and all drivers and/or vehicle owners should be

AEPI HEALTH AND SAFETY POLICY

provided with a copy of this Driving & Motor Vehicle Operation policy prior to participation.

MEMBERS PERSONAL PROPERTY

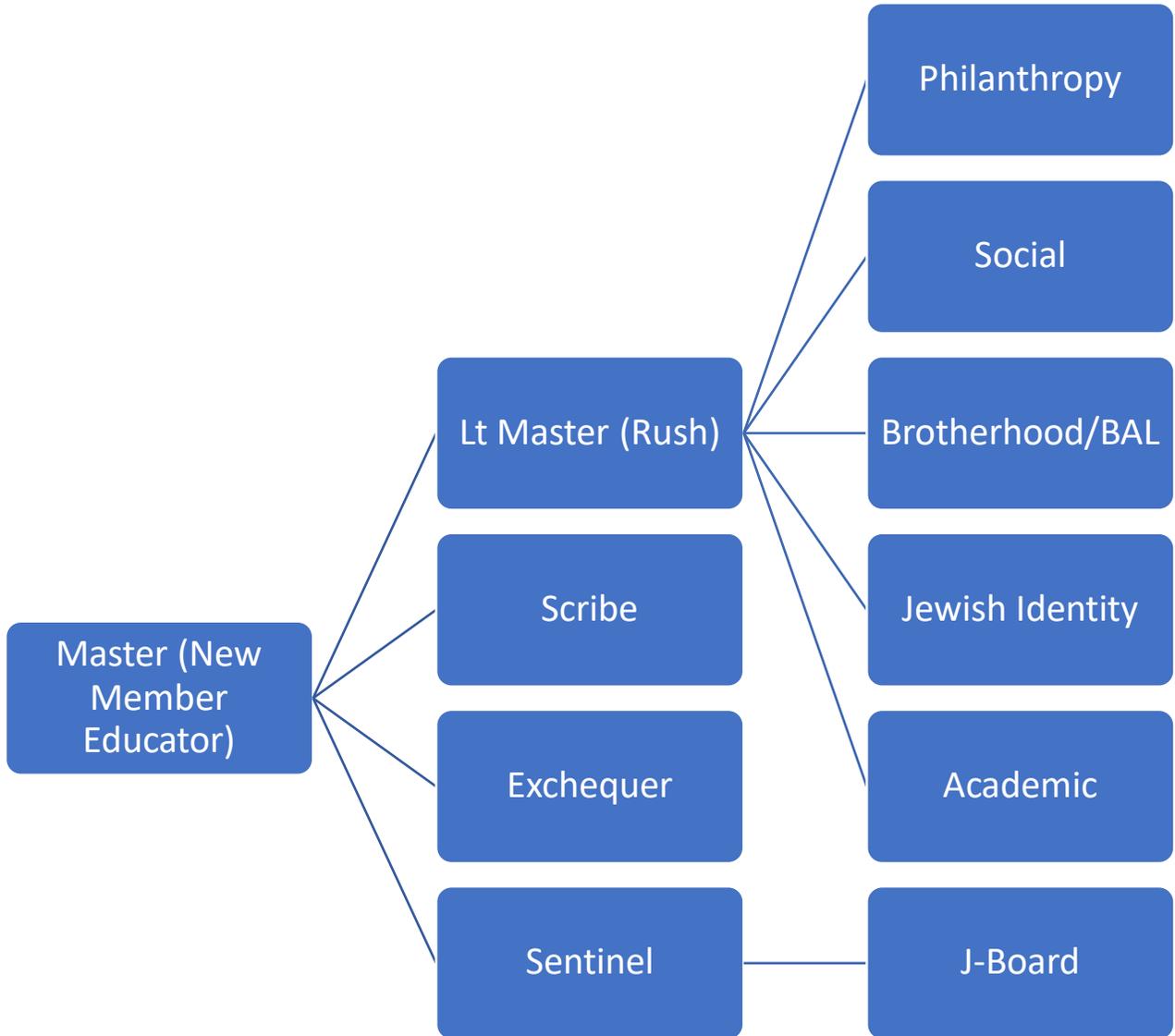
The use of personal property in fraternity activities shall be strictly voluntary and the sole responsibility of the owner. The fraternity assumes no liability or responsibility for any loss or damage to any personal property of members or guests even if used in conjunction with fraternity activities.

CONTRACTUAL AGREEMENTS AND ADDITIONAL INSURED

No chapter, member, or housing organization may enter into any written or oral contract or financial agreement using the name of the fraternity ("Alpha Epsilon Pi"). This includes without limitation such agreements as university agreements, leases, contracts, hold harmless agreements, liability releases, account statements, purchase orders, and hotel or banquet contracts. As the fraternity's insurance does not afford protection for outside parties, no chapter, member, or housing organization may enter into any written or oral agreement under which the responsibility or liability of some party other than the fraternity is assumed. Additional Insured status under the fraternity's insurance requires the prior agreement of both the fraternity and its insurers.

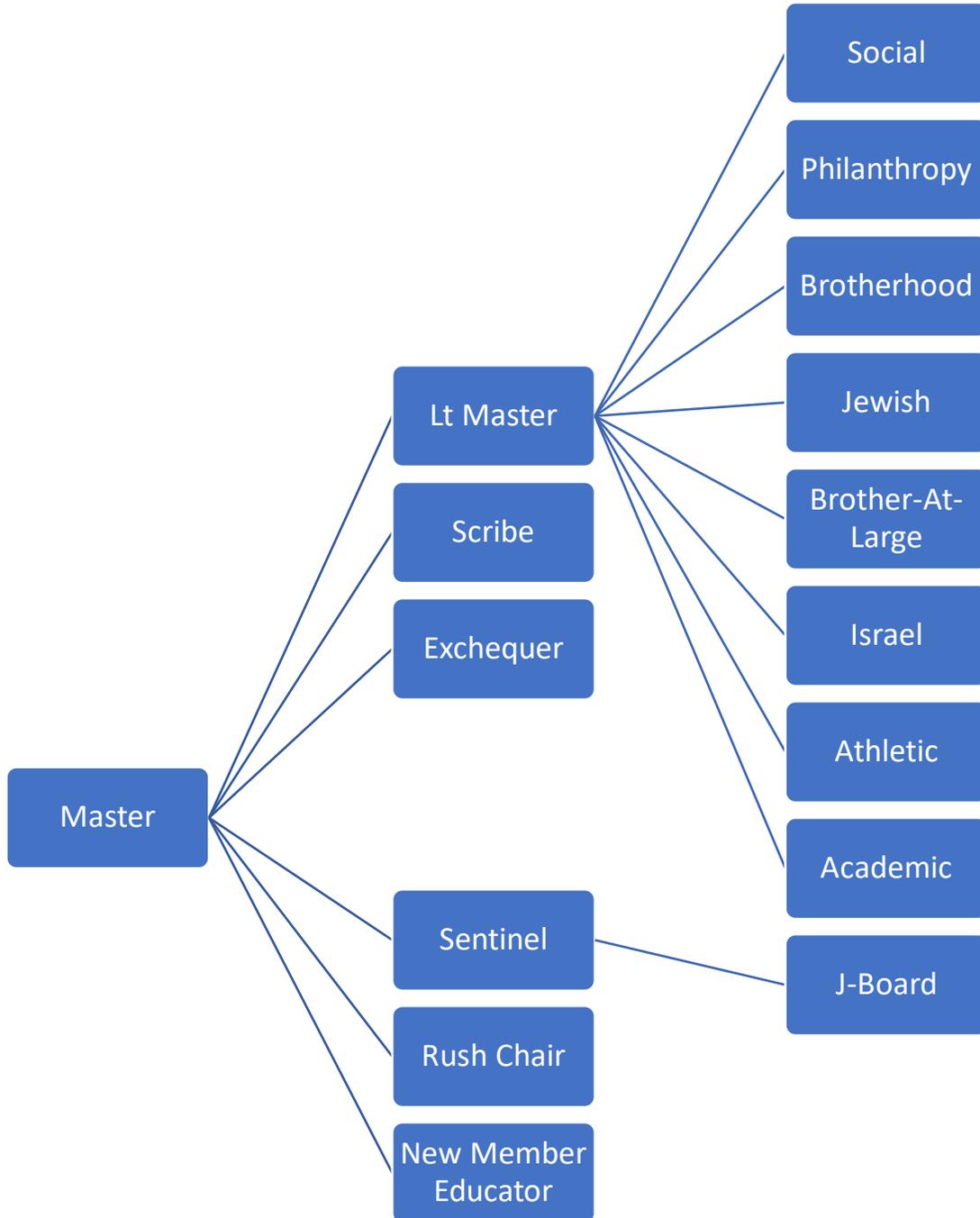
CHAPTER STRUCTURE

Chapter/Colony Under 30 Members – Minimum Recommendation



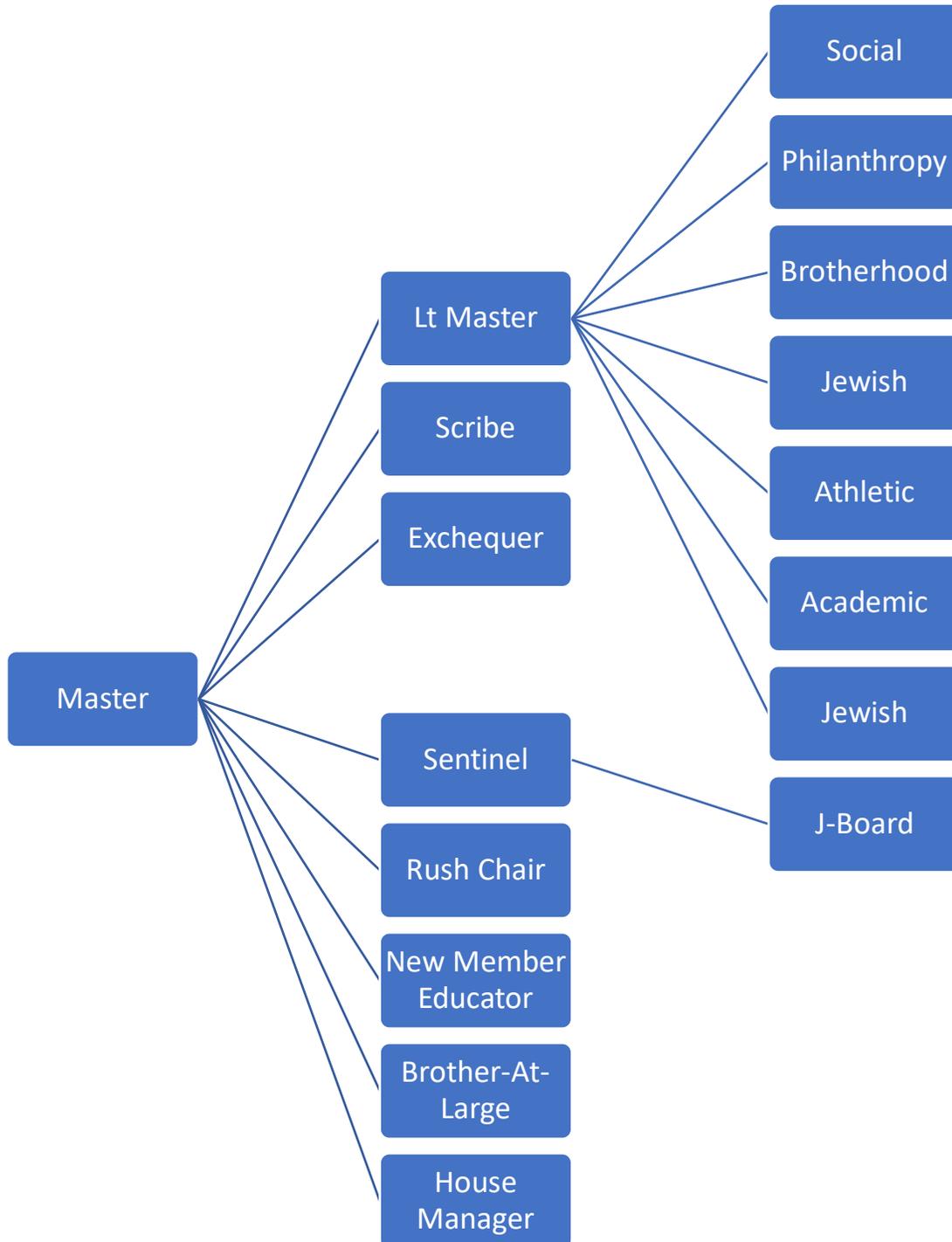
CHAPTER STRUCTURE

Chapter/Colony 31-60 Members – Minimum Recommendation



CHAPTER STRUCTURE

Chapter/Colony 61+ - Minimum Recommendation





Alpha Epsilon Pi

DEVELOPING LEADERSHIP
for the JEWISH COMMUNITY

LIEUTENANT MASTER

EXPECTATIONS OF THE LIEUTENANT MASTER

1. Assist and support the Master in his decisions.
2. Know and enforce AEPi policies - especially those regarding health & safety including sexual assault prevention, alcohol/substance abuse, hazing prevention, fire safety and security, and Good Samaritan.
3. Appoint and manage an effective Minor Board.
4. Plan and execute chapter programming that complies with AEPi's mission.

SUGGESTIONS FOR FULFILLING THESE EXPECTATIONS

- Make it personal. Don't overuse e-mail listservs or groups. When looking for a committee chair or to involve members, pick up the phone. Let your Brothers know they are needed, and they will rise to the occasion. Set up one-on-one meetings with chairmen so they know they are supported.
- Stay organized. Create a minor board folder or binder to track chair and committee progress. Make sure to pass this down to transition officers effectively. This may be done in your chapter's google drive.
- Hold the Minor Board accountable. If a chair or committee is not performing to their potential, increase supervision, offer help, or remove and replace if necessary.
- Develop and re-evaluate chapter programming. Just because something has been done before doesn't make it the best possible program. Work to make sure that chapter programs reflect the chapter and the fraternity's mission and values.
- Work with Master to develop E-Board. You are the Master's right-hand man. Help him to push your E-Board to greatness.
- Assist Minor Board. Be there to support and provide guidance to committee chairs for large or complex events.
- Involve and inform chapter. Always update and provide accurate information about chapter programming to the chapter. It is your job to ensure the calendar is correct and accessible.
- Set goals that fulfill vision. When creating the calendar and deciding on programming make sure the Minor Board is aware of and buys into the Master's vision.
- Recruit your Brothers. Get your chapter more involved by getting Brothers on committees and in chair positions. You get out what you put in. Help them get the most out of the Fraternity. Brothers will be more active if they are important and contributing to the group.
- Create a new chair position. If someone has a new idea, let them run with it. Allow Brothers to be involved in ways they are passionate about.

MINOR BOARD STRUCTURE

*Every chair should have an active role in the New Member Program explaining their position and including all new members in planning, development and execution of events/programs/etc.

Civic Engagement Chair

- Student Government involvement.
- Local Government involvement.
- Local community involvement.
 - Social issue awareness.
- Inform chapter/colony of political issues the community is facing.
- Combating anti-Semitism and BDS movements (local/campus community).
- Chamber of Commerce.
- Hosting members of Police/Fire Departments.

Alumni Chair

- Create an alumni newsletter.
- Update all alumni contact information.
- Host alumni reunions.
 - For all alumni or specific generations of alumni.
- Collect AEPi memorabilia from chapter alumni.
- Create a history log of events, photos, awards, etc.
- Assist in legacy facilitation.
 - Ask alumni who have sons attending college where they are going.
 - Aepi.org/rushrec

Parents Chair

- Parent communication
 - Newsletter or social media updates
- Ask parents to create a Parents Club or Parent Board to help out.
- Host a Parents Weekend.

Israel Engagement Chair

- Organize the Chapter to combat BDS movement on your campus.
- Develop and host positive pro-Israel events on campus.
 - Israel Independence Day events.
 - Israel innovations speakers/panel
- Inform the chapter/colony about opportunities including trips and fellowships.
- Educate the Brothers and/or New Members about history, culture and traditions of Israel.
- Act as liaison to Hebrew language department (if applicable).

Jewish Identity Chair

- Liaison for chapter and Hillel/Chabad/other Jewish organizations on campus.
- Responsible for creating a Jewish home within the Fraternity.
- Planning events with Brother at Large/Israel Engagement Chair around Jewish holidays.
- Promote Jewish values and culture.

MINOR BOARD STRUCTURE

- Coordinate with JLPD and the Jewish Programming Year.
- Apply for all applicable grants through the AEPi Foundation.
- Promote and recruit for Hineni and Tikkun Olam Conferences.
- Liaison with Jewish Studies department (if applicable).

Professional Development Chair

- Work with Alumni Chair to connect with Chapter/local alumni.
- Coordinate events with professional development speakers.
 - Resume building, networking, public speaking.
- Help to find Brothers summer internships or jobs near/around campus.
- Liaison with University Career department.
- Promote and recruit for Leven Leadership Institute.

Athletics Chair

- Register chapter teams for all intramural sports leagues.
- Handle all chapter team coaching appointments.
- Ticket coordination for major sporting events.
- Work with Brother at Large on all Brotherhood-related sporting events/outings.
- Coordinate Brotherhood tournaments.
- March Madness brackets, Super Bowl squares, etc.

Social Chair

- Coordinate and plan all chapter social functions.
- Ensure all Brothers and guests are having fun.
 - Appoint 'Fun Monitors.'
- Work with Sentinel to ensure Health & Safety protocols are enforced.
- Work with the Executive Board to educate members on social policies regarding societal issues.
 - Sexual assault prevention, alcohol and drug abuse, bystander intervention.

Academic Chair

- Coordinate study hours in house or at library.
- Organize notes and textbooks for future Brothers.
- Collect GPAs from Brothers (if the University does not).
- Facilitate a tutoring program for those that need assistance.
- Facilitate academic probation program for those that do not make grades.
- Work with New Member Educator to carefully review academics of New Members.

Philanthropy Chair

- Internal/External Chair model (if desired).
 - Internal is responsible for chapter's own philanthropy event.
 - External is responsible for promoting and recruiting for other Greek community philanthropy events.
- Choose an organization to donate to (AEPi Brothers choose new philanthropies every year at

MINOR BOARD STRUCTURE

- Convention).
 - Set a goal to host at least one event per semester.
 - One semester can be a larger scale event to one philanthropy, while the other semester can be smaller scale and to a different philanthropy.
- Fundraising
 - The focus of philanthropy is raising money, not the event.
 - The event is a marketing tool for your chapter/colony to fundraise.
 - Fundraising techniques include letter writing campaigns, Text-a-thon, canning, sponsorships.

Community Service Chair

- Proactive community volunteering.
- Set a schedule of regular volunteer plans.
- Assign and recruit Brothers for different community service events.
- Require a certain number of community service hours per Brother per semester.
 - Track total hours for Brothers and chapter as a whole.
- Plan for chapter-wide or individual volunteer activities.

MINOR BOARD TRANSITIONS

Effective Minor Board Transitions

It Starts In New Member Education – Learning the Positions

It is imperative that new members learn the ins and outs of minor board as soon as possible, usually two weeks into their education period. This enables them to jump right in.

Consider having a *Minor Board Day* where all of the chair positions have a few minutes to talk about their position, what they do on the day-to-day, and why every member should want to be part of their committee.

Shadowing

As soon as your members learn about the minor board, they are ready to start adding value to your chapter.

Try to have each new member pinpoint one or two committees or minor board positions they really want to be involved with upon initiation. Allow them to join minor board meetings for those positions and operate like any other Brother in the room. Many chapters forget that these brand new members have an objective view and often brand new ideas to add to the mix.

Getting to Work

Chapters often say the new member education period is too early to let members plan events or hold positions. But if not now, when? The beauty of our organization that is that we are a *Learning Laboratory*. You will have many opportunities in AEPi and often will fail. The important part is that you learn from those mistakes.

Try to challenge new members to join in the planning process with the Brothers so that as soon as they are initiated, they have a firm grasp of how to be successful as a minor board member. Start small, consider having them plan a video game tournament or a board game night. You will very quickly be able to see which members are ready to take on more work and contribute on a higher level.

What Does the Chapter Need – SWOT Analysis

MINOR BOARD TRANSITIONS

One of the most important things to do as a chapter is to identify weaknesses. Just because you have always had six brotherhood events and no philanthropy events doesn't mean that you have found the best balance.

The LT Master and a committee of change makers should take a step back and conduct a SWOT analysis. That is – when thinking about chapter programming, what have been strengths of yours? Have you had really great brotherhood events lately? Has your Academic Chair stepped up and updated all of your study hour protocols and incentives for good grades? Continue by bringing up weaknesses. Where are areas you really need to improve? Finally, follow this up with opportunities for growth whether that is working with other organizations or finding others in the community to partner with, as well as coming up with external threats, like the COVID-19 pandemic or your go-to catering location going out of business.

Once you have done this, you should be able to select chair positions or increase the size of certain committees in order to make up ground.

Transition Time

Arguably the most important step in the entire process is sharing all relevant documentation.

A great chapter has a thorough but consider google drive with documents and resources, links to AEPi HQ's YouTube page, and anything else specific to the chapter. An outgoing chair should be able to virtually hand off the folder to the new chairman and talk about any YouTube videos from HQ that may help. Consider using event planning forms to document all events held and saving them in the drive in a neat and orderly fashion. This way, you very rarely have to start from scratch and you definitely never need to reinvent the wheel.

Goal Setting and Accountability

All is for naught if there is no end goal in mind. Try to ask yourself, what would the best Brother of all time do in this role? Think about the objectives/results you are trying to achieve and set goals based off of those outcomes.

Set SMART goals and communicate them with your LT Master or the rest of your committee. When they are written down **E X T R A L A R G E** for all to see you have a much better probability of moving toward that goal. Ask for regular check-ins much before the deadline if your LT Master didn't already schedule them with you. It is okay to manage up!

CIVIC ENGAGEMENT CHAIR MANUAL

Civic engagement means working to make a difference in the civic life of our communities and developing the combination of knowledge, skills, values and motivation to make that difference. It means promoting the quality of life in a community, through both political and non-political processes

Why AEPi Cares

- Civic Engagement positively affects a college student
- Service positively affects students' values for civic activism and diversity, leadership efficacy, and desire to serve after graduation
- Students who joined a fraternity or sorority during their first year of college have 123% greater odds of volunteering over non-members.
- Shows potential members a well-rounded chapter
- Jewish Value of helping your fellow human

3 Components of Civic Engagement

1. Campus Activism
 - Being active in student organizations outside of AEPi
2. Community Activism
 - Volunteering your time to better the community surrounding your campus
3. Political Activism
 - Keeping brothers politically informed

How?

- Encourage brothers to get involved in other organizations
- Inform chapter/colony of political issues the community is facing
- Inform chapter/colony of political elections taking place
- Help brothers register to vote
- Inform brothers of campus elections or referendums
- Plan & log community service events
- Represent AEPi to non-Greek organizations (with the Master)
- Identify Brothers who want to get involved in Student Government (either running a campaign for someone else or running themselves)

ISRAEL ENGAGEMENT CHAIR MANUAL

There is no place in the world more meaningful to the Jewish people than Israel. While the ancient land of Israel has always been home to the Jews, since 1948, the modern State of Israel has completely transformed what it means to be a Jew. Because of the State of Israel, Jews have a national identity, wherever they live.

Why AEPi Cares

- AEPi strives to develop the future leaders of the world's Jewish communities
- AEPi seeks to enhance its members in different ways
- Show potential members and the community one way AEPi is different than any other Fraternity
- The Jewish value of loving the people of Israel
- AEPi Brothers live in Israel.
- AEPi Brothers have family, friends, and Fraternity Brothers in Israel.

4 Pillars of AEPi Israel Program

1: Engagement

- Inform the Chapter/ colony about opportunities including trips and fellowships
- Motivate Brothers to take an active role in organizations on campus
- Encourage the Brothers to help out and volunteer for events and organizations
- Apply for micro grants to run or co-sponsor events on campus

2: Advocacy

- Serve as liaison to on-campus organizations to the Brotherhood
- Serve as liaison for national and international Pro Israel organizations to the Brotherhood
- Work with chapter/colony's Jewish Programming Associate to be connected to partner organizations

3: Education

- Educate the Brothers and/or New Members about the History, culture, and traditions of Israel
- Expose the Brotherhood to different Experiences coming out of Israel (TV shows, movies)
- Utilize Israel as a medium to teach the Brotherhood values and life lessons

4: Personal Development

- Share volunteering and interning opportunities in Israel with the Brothers
- Connect Brothers to different programs that help develop their interest that utilize Israel as a means
- Work with their chapter/colony's Jewish Programming Associate to help Brothers get connected to organization who have professional opportunities in Israel.

JEWISH IDENTITY CHAIR MANUAL

WHY JEWISH PROGRAMMING?

Alpha Epsilon Pi was created to act as the home away from home for the Jewish man on college campuses. Our mutually shared Jewish heritage is what makes our brotherhood so strong. It is that mutual lifetime experience that bonds our fraternity together. In this way, we are different than any other college fraternal organization in the world. In order to create that home away from home that bonds all of us together, our brothers rely on their Jewish Identity Chair to create that mutually understood programming.

WHAT IS THE JOB OF THE JEWISH IDENTITY CHAIR

The Job of the Jewish Identity Chair (JIC) is:

- Organize Jewish programming to the chapter/colony. Programming should be tailored to the interests of the Brothers in the chapter/ colony.
- Act as the liaison between the chapter/colony and Jewish organizations on campus (Hillel, Chabad, Jewish Student Council, etc). He should cultivate these relationships to benefit all aspects of fraternity and campus life, both for the brothers and the chapter as a whole.
- Communicate with chapter's Jewish Programming Associate from AEPi International Headquarters

WHAT KIND OF JEWISH PROGRAMMING SHOULD THE

JIC PROVIDE?

This will differ from chapter to chapter. The best thing that JIC can do is talk to his brothers about what they would enjoy. Judaism can be brought into any event that the chapter enjoys doing, whether that be sports or video games, social events or academics, a good JIC can add Jewish programming to anything.

For some AEPi chapters/colonies, the most meaningful event will be a Shabbat service and meal following the strictest rules of Kashrut and Jewish law. For other chapters/colonies, having

JEWISH IDENTITY CHAIR MANUAL

everyone smoking a hookah in the Sukkah during the holiday of Sukkot will be the kind of Jewish programming that speaks to them. Both of these types of events should be strongly encouraged. AEPi is a Jewish fraternity that nature is not just specifically religious but social in nature.

JEWISH PROGRAMMING YEAR

ANNUAL JEWISH PROGRAMMING OVERVIEW

Alpha Epsilon Pi doesn't just say we are a Jewish fraternity – we show it. These programs are a part of what gives AEPi its global presence on all of our campuses. AEPi's International Headquarters is able to provide assistance with all of these programs, and the Jewish Programming Year is available online at aepi.org/JPY for your reference.

The dates for AEPi's Jewish programs are:

- Tu BiShvat Seder: Jan. 27 - Feb. 5
- We Walk To Remember: Month of April
(Yom HaShoah: April 8 - 9)
- Passover Seder: March 27 - April 4
- Sukkot: Sept. 20 - 27
- Shabbat Across AEII: Nov. 5 and 12



TU BISHVAT SEDER

Our newest annual program gathers Brothers to celebrate the New Year for the trees. Hang out, eat fresh fruits and enjoy a Seder with your Brothers.

Those who partake in a Tu BiShvat Seder will eat at least 15 different types of fruits and vegetables. It is also customary to include the seven species mentioned in the Torah: wheat, barley, grapes, figs, pomegranates, olives and dates.

In partnership with
Jewish National Fund



JEWISH PROGRAMMING YEAR

WE WALK TO REMEMBER

Held in congruence with B'nai B'rith International, We Walk to Remember (WW2R) is AEII's oldest annual program – first held at NYU in 2006.

AEII Brothers, along with other members of their communities, dress in black and hold silent processions through campus as a way to honor those who were killed in the Holocaust.

This is one of the most important programs AEII hosts as there are very few Holocaust survivors left, and we do not want their stories to disappear. As long as WW2R continues on college campuses around the world, no one will ever forget the horrors of the Holocaust.

We Remember.



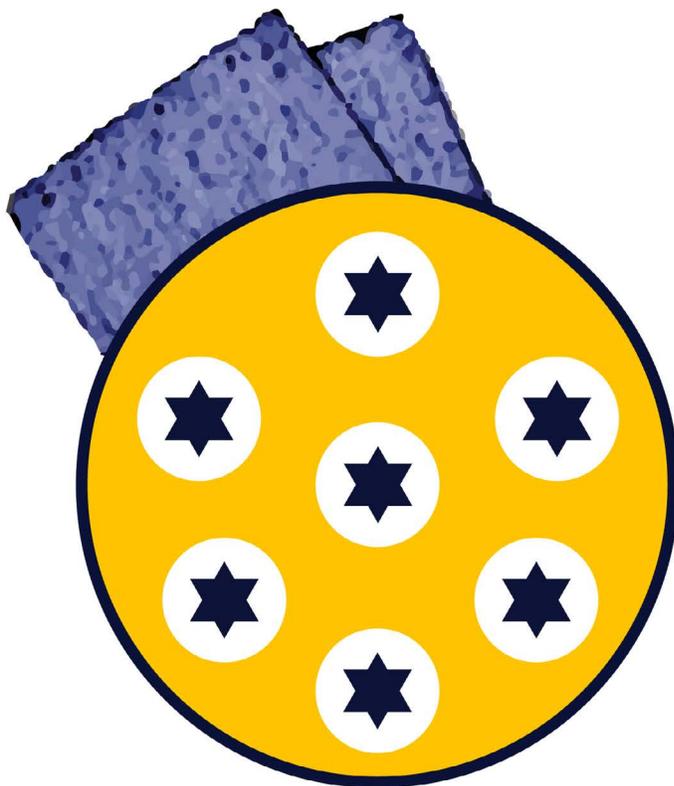
**B'NAI B'RITH
INTERNATIONAL**



PASSOVER

Passover is a time for families to gather around the Seder table, eat matzah and bitter herbs, drink wine and retell the story of the Exodus from Egypt. On college campuses around the world, AEII aims to serve as a home-away-from-home for men as they navigate their college career.

For those who are not able to go home, your chapter can host a Passover Seder to further make AEII that home-away-from-home.



JEWISH PROGRAMMING YEAR

SUKKOT

Sukkot, a Hebrew word meaning "booths" or "huts," refers to the Jewish festival of giving thanks for the fall harvest and commemorates the 40 years of Jewish wandering in the desert after the giving of the Torah atop Mount Sinai. This seven-day holiday calls for Jews to erect a sukkah.

For this program, your chapter builds a sukkah – a small, temporary booth or hut – at your house and hosts an event in it. You can also partner with another organization on campus (Hillel, Chabad, etc.) to build your sukkah and host an event.

**In partnership with
Chabad on Campus**



JEWISH PROGRAMMING YEAR

SHABBAT ACROSS AEΠ

A product of the 2011 Hineni Jewish Identity Enrichment Conference, Shabbat Across AEΠ has grown to be one of our largest programs.

Chapters worldwide give substance to our international Brotherhood by simultaneously hosting a Shabbat dinner the Friday before or following our Founders Day – November 7. This can be the traditional chicken, mashed potatoes and green beans meal, or your chapter can put its own twist on it!



JEWISH PROGRAMMING YEAR

LETTER-WRITING CAMPAIGNS

A letter-writing campaign engages chapter members by sending out letters to family and friends in each Brother's respective communities to explain your philanthropic endeavors, introduce your event and show them where they can go to learn more and donate.

Contact **Chief Programming Officer Jonathan Bridge** at jbridge@aepi.org or (317) 876-1913 for any questions about the process.

How do we do a letter-writing campaign?

- Collect a list of names and addresses from your Brothers.
- Ask for 10 addresses from each Brother for an adequate letter-writing campaign.
- Make sure the addresses are in an Excel document in the same format as the *Address List Template* that is available on Openbook under the "documents" tab.
- Write the letter. A sample letter is available on Openbook under the "documents" tab.
- Send the two documents to jbridge@aepi.org & IHQ will take care of the rest.

How will people make a tax-deductible donation to the Repair The World Fund?



Your chapter's fundraising page on aepi.crowdchange.co



Checks made out to the Alpha Epsilon Pi Foundation
8815 Wesleyan Road, Indianapolis, IN 46268

Who should we send letters to?

- Parents
- Grandparents
- Aunts & Uncles
- Cousins
- Family friends
- Neighbors
- Your friends
- Anyone you would invite to your Bar Mitzvah

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PHILANTHROPY CHAIR MANUAL

WHY PHILANTHROPY?

Philanthropy is one of the ways in which Alpha Epsilon Pi Brothers can work to have a positive impact on the world around them. AEPi's Official Philanthropy program works to further the mission of Alpha Epsilon Pi, it helps to support Jewish Communities of the world and the individuals that are most important to us

THE ROLE OF THE PHILANTHROPY CHAIR

The Chapter's Philanthropy Chair's first and foremost goal is to oversee the Philanthropy Committee and the fundraising for Alpha Epsilon Pi's Official Philanthropy Program. The Philanthropy Chair will keep in contact with his Chapters Jewish Programming associate who will assist in fundraising techniques and success of your event.

The Philanthropy Chair will also be responsible for taking charge of or delegating the responsibility of looking after the chapter's <https://aepi.crowdchange.co/> page. This page will act as the chapter's main tool for a successful event.

UNDERSTANDING THE OFFICIAL PHILANTHROPY PROGRAM

Alpha Epsilon Pi commits to raising \$100,000 dollars to each organization that is apart of AEPi's Official Philanthropy Program. Undergraduate Brothers vote new organizations into the Official Philanthropy Program each year. All of these organizations work to further Alpha Epsilon Pi's Mission. The 2019-2020 AEPi Official Philanthropies are listed below:

United Hatzalah

United Hatzalah of Israel is the largest independent, non-profit, fully volunteer Emergency Medical Service organization that provides the fastest and free emergency medical first response throughout Israel. United Hatzalah's service is available to all people regardless of race, religion, or national origin. United Hatzalah has more than 5,000 volunteers around the country, available around the clock – 24 hours a day, 7 days a week, 365 days a year. With the help of our unique GPS technology and our iconic ambucycles, our average response time is less than 3 minutes across the country and 90 seconds in metropolitan areas. Our mission is to arrive at the scene of medical emergencies as soon as possible and provide the patient with professional and appropriate medical aid until an ambulance arrives, resulting in many more lives saved.

PHILANTHROPY CHAIR MANUAL

Israel Cancer Research Fund

Israel Cancer Research Fund (ICRF) is a nationwide charitable organization that receives its total income from private donations. ICRF was founded in 1975 by a group of American and Canadian researchers, oncologists, and lay people determined to harness Israel's educational and scientific resources in the fight against cancer. Its initial purpose was to stem the "brain drain" of Israeli researchers by providing funds for postdoctoral fellowships for young Ph.D.'s. ICRF is the only U.S.-based charity solely devoted to supporting cancer research in Israel.

Since its inception, ICRF has provided more than \$68 million to support innovative studies by Israeli scientists. Our awardees are selected through a rigorous peer-review process that is conducted by a world-class scientific panel. We support individuals at all of the major research institutions in Israel. ICRF-funded researchers have been making significant progress and have been able to develop improved chemotherapies, advanced techniques in bone marrow transplantation, and an enhanced understanding of tumor suppressor genes.

The Jaffa Institute

The Jaffa Institute was established in 1982 by Dr. David Portowicz and Col. Ze'ev (Zonik) Shaham as a private, non-profit, multi-service social agency to assist the city of Jaffa's severely disadvantaged children and their families. Through the Jaffa institute the official philanthropy program will be supporting the Neve Ofer Crisis Intervention House that helps at-risk children.

PHILANTHROPY CHAIR MANUAL

BEST PRACTICES FOR PHILANTHROPY

Philanthropy is the combination of giving both time and money in this way it is different than charity and volunteering. Because of this, there are some best practices that will make any philanthropy successful.

- 1) **Fundraising** is vital to raising money, not the event. The event is a marketing tool for your chapter/colony to use to fundraise. Everything that is done around the event is what raises the money. Some successful fundraising techniques are:
 - a) **A Letter Writing Campaign.** The Philanthropy Chair will collect names and addresses on an excel sheet from brothers within the chapter (about 10 per brother is recommended). This list will be given to the international office who will send out the letters with no charge to the chapter. All proceeds will go to the official philanthropy and be credited to the specific chapter
 - b) **Text-a-Thon:** A Text-a-Thon is an event in which brothers send out there event's <https://aepi.crowdchange.co/> link and request a donation. While not every person gives, this is an easy way to raise money with little to know effort. 10 brothers in an hour have raised over \$2000 just by sending out a simple copy and paste message. Your chapter's Jewish Programming Associate can help you craft this message.
 - c) **Canning:** Canning is simple. Brothers will stand outside stores (Walmart, Gorcery), bars, and on street corners, and ask for money for their event. An hour of canning once a week has been shown to easily raise \$10,000 over the course of a semester. **YOU MAY NEED A PERMIT TO CAN.** Check with the store or local municipality to inquire about a permit.
- 2) **Sponsorship** is a major key to successful philanthropy. <https://aepi.crowdchange.co/> has a convenient system for creating tiers in which companies can receive different marketing options that will benefit them. Every dollar of sponsorship in money or items that you receive is another dollar that can go towards philanthropy.
- 3) Asking for money is okay. There is **no shame** in raising money for a good cause. This will be the brothers' biggest hesitation in doing philanthropy. The job of the philanthropy chair is to break that hesitation.
- 4) <https://aepi.crowdchange.co/> and Openbook have many different resources to create successful philanthropy. Utilize the websites and their different resources to make your life as Philanthropy Chair as easy as possible.
- 5) **Motivation** is crucial. When talking to your chapter about doing philanthropy comes in with a laid out plan and a motivational pitch that will get each and every brother of the chapter excited to make a difference in the world.

A QUICK GUIDE TO ALPHA EPSILON PI'S OFFICIAL PHILANTHROPY PROGRAM

#aepigivesback

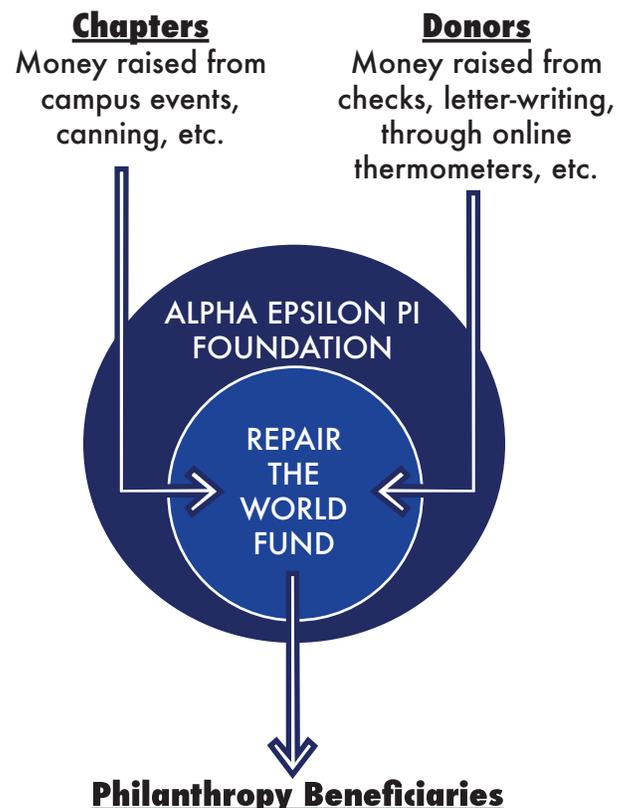
MISSION STATEMENT

The Alpha Epsilon Pi Official Philanthropy Program (OPP) is committed to supporting Jewish causes to reinforce the Jewish ideal of Tikkun Olam – repairing the world. As an international fraternity, we recognize the role the Jewish people around the world have played in shaping our Brothers' lives. Through our philanthropic endeavors, Alpha Epsilon Pi strives to give back to the Jewish community using the Repair the World Fund to benefit organizations around the world. We aim to give back through the OPP and foster the development of our Brothers into responsible citizens as they become the Jewish leaders of tomorrow.

In order to repair the world, the AEPi OPP holds the following values in highest priority:

- Providing assistance to those without adequate resources
- Supporting the fight against debilitating disease
- Developing education
- Strengthening Jewish identity
- Providing opportunities for youth
- Worldwide disaster relief

WHERE DOES THE MONEY GO?



A QUICK GUIDE TO ALPHA EPSILON PI'S OFFICIAL PHILANTHROPY PROGRAM

#aepigivesback

FUNDRAISING TECHNIQUES

Campus Event

A campus event is a great way to engage the Greek, Jewish, and campus communities. Whether you're holding a Latke-Fest, a Rock-A-Thon, a basketball tournament, or a Pie-a-Pi, these events serve as the face of your chapter's hard philanthropic work. Although your campus event is important, the real money is made with the three techniques below because they reach out to audiences beyond college students.

Letter-Writing Campaign

- Step 1: Write a letter to friends and family asking for donations to the OPP in the name of your chapter.
- Step 2: Collect 10 addresses from every Brother.
- Step 3: Send both of these to HQ and we'll do the rest!

Canning

This is the easiest way to raise money in your community! Pick high-traffic areas like Walmarts, drug stores or bars and have all Brothers take shifts in front of these locations where they ask for small donations. Pro Tip: Bring credit card readers!

Sponsorships

Acquiring sponsorships is a great way to cover costs for your fundraising techniques. Additionally, also consider monetary sponsorships for fundraising.

FAQ

Where does all the money we raised go?

All money raised by AEPi chapters goes through the Repair The World Fund as part of the AEPi Foundation. This money is then divided equally between our Philanthropy Beneficiaries.

Are donations to my chapter tax-deductible?

No. Individual chapters do not have the 501(c)(3) tax status that allows donations to be tax-deductible. However, all donations to the AEPi Foundation are tax deductible and will be counted toward your chapter's total funds raised.

How can our family and friends make donations?

Tax-deductible donations can be made via your chapter's custom page at aepi.crowdchange.co OR via checks made out to the AEPi Foundation with your chapter's designation in the memo line. Send checks to "Official Philanthropy Program" at 8815 Wesleyan Road, Indianapolis, IN 46268.

How are we supposed to pay for the letters?

All chapters who contribute to the OPP can send a donation letter and an address list to mlencer@aepi.org. and we'll pay for the printing, envelopes, and postage for you! Templates for those documents are available for download in the "For Chapters" section.

Can we support just one of the beneficiaries?

Participating in AEPi's Official Philanthropy Program means raising money to give back to the Jewish community through all of our current beneficiaries. By raising money through the Repair The World Fund, every chapter truly is a part of that mission.

Will adding more events to our philanthropic efforts help us raise more money?

Not significantly. Although adding more events gives you more chances to raise money, your campus events are primarily only reaching out to your Greek and student communities. Reaching out to other audiences is paramount to increasing your fundraising total.

Why doesn't our increase in funds raised reflect the increase in effort we put in to our event?

There is only so much money the average college student, even one in Greek life, can give to a philanthropy event. In order to better raise your totals, increase your chapter's participation in other fundraising techniques, such as letter-writing and canning!

The Pitch: Chapter Buy-In

Once you have planned your event, you must gain your chapter's support. When you present your philanthropy plan to your chapter, you must win over your chapter quickly. Make sure to blow them away. If you've set defined goals and pre-planned your event, you'll win over your chapter more easily. No one likes listening to someone who is unprepared. Remember, you are selling the overall idea AND your goals. You will plan the logistics of the event once your chapter is on board.

During your pitch, make sure your chapter knows you are a man of action and you know what it takes to get the job done. You need to show that you will be successful and that your whole chapter will be successful as well by following your plan. Below, you will find two example pitches:

THE AVERAGE PHILANTHROPY CHAIR'S PITCH

"We have a philanthropy to plan. This year we're thinking about doing a basketball tournament and inviting other fraternities to play. I need help, so if you're interested, please see me after the meeting. "

What is wrong with this pitch? It lacks specifics and details, it sounds like you are unorganized, it makes philanthropy sound like a chore or pain, and it does not motivate anyone, including you.

THE SUCCESSFUL PHILANTHROPY CHAIR'S PITCH

"Brothers, on November 15th, we are going to host a Greek basketball tournament that will raise \$5,000 for AEPi's Repair The World Fund. I plan on having 20 fraternities, sororities, and other campus organizations participating in the tournament. We are going to have sponsors as well. There will be prizes. I have a plan of action and at the end of the day we will definitely raise \$5,000. This is something that, if done right, will look great on our resumes. In order to accomplish this, I need 5-6 brothers on my philanthropy committee. Three will help with recruitment, two will help with sponsorships, and one will help me plan the logistics of the event. I am going to pass around a sign up sheet. If you are interested, please put down your name and we will talk after the meeting."

What is great about this pitch?

- "Brothers, on November 15" - This shows you already have a time and date. This lets your chapter know you are organized.
- "That we will raise \$5,000" - This shows you have a goal. Hearing that you want to raise \$5,000 offers your chapter a challenge and piques their interest.
- "20 fraternities, sororities, and other groups participating" - This shows you have a plan and that you are getting your chapter involved with other organizations.
- "Sponsors" - This shows that you are taking this event to the next level.
- "Will look great on our resumes" - This gives your brothers an incentive to help.
- "I need 5-6 brothers, three for recruitment, two for sponsors, and one for planning logistics" - This shows you are organized and lets brothers know what they will be responsible for. Now your brothers are thinking about where they can help.
- "Put down your name and we'll talk" - This shows that there will be some sort of selection process and that you are not just taking anyone.

PHILANTHROPY EVENT BANK

#aepigivesback

These tried and true events that have been successful at chapters of varying sizes all over the country. Feel free to tweak these to adapt them for your own chapter. Remember that for successful fundraising, the key is in how well you execute all of your fundraising techniques. Hosting an event is just one fundraising technique, so it needs to be accompanied by other tactics, such as a letter-writing campaign, sponsorships or canning. Be sure to talk to your chapter's Jewish Programming Associate when planning your event to help maximize your success.

PIE-A-PI



Your brothers act as the targets while everyone else takes aim! Charge a set rate for attendees to pie a brother in the face. For best results, offer deals for buying more pies, make sure to have a credit card reader on hand and get the whipped cream donated by a local business, or use shave cream for easy clean-up.

24-HOUR FOOD SALE



A food sale, such as Latkafest or Dog Days, is a big money maker if done correctly. Get sponsorships for the food and sell it on campus for a profit. This is an easy way to build partnerships with Hillel or Chabad on campus.

ANIMAL HOUSE



Bring the zoo to your house! Contact an exotic pet store near you and make a deal to have them bring animals to your event. Charge admission, set up a photo booth and let the fun begin!

ROCK-A-THON



Brothers solicit donations prior to the event and then sit in a rocking chair for 24 hours or as long as they can. Generally, someone must be rocking at all times. You will be amazed how much support can be garnered just for sitting!

SPLASH BASH



Who doesn't love a paint party? Cover up your house or another venue with tarps, charge for admission and let the colors fly! Local craft stores could be great sponsors for this event. Adding the sale of neon-colored merchandise can be great for this event.

SPORTS



One-up the IM sports leagues with a tournament of your own! Reserve a spot on or near campus where you can hold the event, set a price for team registration, and recruit teams from Greek life and other campus groups to play. To bring in more money, implement monetary additions to the rules of the game, such as paying a dollar to buy back into a dodgeball game or get an extra player per play on the field in flag football. Additionally, these events have the highest potential for merchandise sales.

A QUICK GUIDE TO LETTER-WRITING CAMPAIGNS

#aepigivesback

One of the most successful fundraising techniques we have seen amongst our chapters has been the use of letter-writing campaigns. Check out the information below for everything you need to know about how to set one up for your chapter! Feel free to contact Chief Programming Officer Jon Bridge at jbridge@aepi.org or at (317) 876-1913 for any questions about the process.

What is a letter-writing campaign?

A letter-writing campaign consists of sending out letters to family and friends from each brother's respective communities to explain your philanthropic endeavors, introduce your event and show them where they can go to learn more and donate. This is a fundraising technique used not only by our most successful chapters but by nonprofit organizations, political campaigns and a numerous other fundraising efforts. Sending out these letters is helpful because it gives you an opportunity to provide a great amount of detail about your philanthropic efforts to a large amount of people in a very efficient and personal way.

How do we hold a letter-writing campaign?

First, collect a list of names and addresses from your Brothers. Ask for 10 addresses from each Brother for an adequate letter-writing campaign. Make sure the addresses are in an Excel document in the same format as the Address List Template that is available in the "documents" section on Openbook. Next, write the letter that you will send out. A template letter that you can edit to reflect the information about your chapter's event and efforts is also available in "documents" section on Openbook. Finally, send the two documents to Chief Programming Officer Jon Bridge at jbridge@aepi.org and IHQ will take care of the mail-merging, printing, envelope-stuffing and postage for you, all for free!

How will people donate?

In the letter, you will direct everyone to your chapter's fundraising page on aepi.crowdchange.co. After your chapter registers on the site, an event page can be created for each philanthropy event the chapter holds. Once your donors are on your page, there is a donation portal through which they will be able to make tax-deductible donations to the Repair The World Fund in the name of your chapter. Additionally, checks made out to the Alpha Epsilon Pi Foundation may be sent to the International Headquarters office at 8815 Wesleyan Road, Indianapolis, IN 46268. Make sure to include the chapter designation in the memo line!

Who should we send letters to?

This is a great way to reach out to family and friends from back home. If Brothers are struggling to find where these addresses should come from, remind them of a few different groups. Who gave them money for their Bar Mitzvah? You'll have those addresses somewhere from the thank you letters. Has anyone in the family gotten married recently? They would have had to send out wedding invitations. Brothers often feel uncomfortable asking their parents for money, so have them ask their parents for addresses! For anyone who is wary of asking for money in general, remind them that this is also just a free way to publicize their event, tell the world about the great things they're doing as an organization and show them how to support the cause should they feel compelled to do so.

SPONSORSHIP LEVELS SAMPLE

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Platinum (\$300 or equivalent in gift cards or materials)

- Company recognition in the name of the event (Ex. Company X presents the third annual Brother Auction)
- Advertisement to run on chapter's event page/social media/website for three months
- Two full-page ads in program
- Logo displayed on t-shirt
- Three documents to put into the guest bag
- Verbal recognition at auction

Gold (\$200 or equivalent in gift cards or materials)

- Advertisement to run on chapter's event page/social media/website for one month
- One full-page ad and a half-page ad in program
- Logo displayed on t-shirt
- Two documents to put into the guest bag
- Verbal recognition at auction

Silver (\$100 or equivalent in gift cards or materials)

- One full-page ad in program
- Logo displayed on t-shirt
- One document to put in the guest bag
- Verbal recognition at auction

Bronze (\$50 or equivalent in gift cards or materials)

- One half-page ad in program
- One document to put in the guest bag
- Verbal recognition at auction

Friend (\$25 or equivalent in gift cards or materials)

- One document to put in the guest bag

SPONSORSHIP LETTER EXAMPLE



Alpha Epsilon Pi
DEVELOPING LEADERSHIP
for the JEWISH COMMUNITY



Alpha Epsilon Pi, **(Chapter Designation)** Chapter
(House Address or Chapter Location)

(Date)

Dear **(Local Business Owner)**,

The brothers of the **(Chapter Designation)** Chapter of Alpha Epsilon Pi at **(University Name)** are proud to present **(Event Name)**, our brand new philanthropic event. On **(Date of Event)**, we will be holding a **(Type of Event)** on campus. All of our brothers will also be hard at work out in our community asking for donations. All proceeds contribute to AEPi's Repair The World Fund, which supports Jewish organizations all over the world.

Our brothers pride ourselves on practicing the Jewish ideal of Tikkun Olam, or Repairing the World. We recognize the role the global Jewish community has played in shaping our lives, so we join AEPi brothers from chapters all around the world in raising money through our Repair the World Fund to contribute \$100,000 each to three Jewish organizations: United Hatzalah, The Jaffa Institute and the Israel Cancer Research Fund. we will be raising \$300,000 for these amazing organizations! Please visit <https://www.aepi.org/philanthropy/#official-philanthropy> for more information about our event, our philanthropy beneficiaries, and the mission of AEPi's Official Philanthropy Program.

As a local business, we would love to have your support in our philanthropic efforts. We welcome your help in any form, whether it be providing materials for our event, providing gift cards that can be won as prizes, or even supporting our efforts financially. All corporate sponsors can have their company name on our campus promotions and event t-shirts. Additionally, all financial donations are tax-deductible. Such donations must be made through the Alpha Epsilon Pi Foundation, so let us know if you plan on donating this way. We are open to any possibilities you might have for sponsorship and would love to sit down with your business to discuss other sponsorship ideas.

Thank you for your consideration and support. We look forward to working with your business. Please let us know if you have any questions.

Sincerely,

(Lieutenant Master's Name)
Lieutenant Master, Alpha Epsilon Pi
(Chapter Designation) Chapter
(Lieutenant Master's Email Address)
(Lieutenant Master's Phone Number)

(Philanthropy Chair's Name)
Philanthropy Chair, Alpha Epsilon Pi
(Chapter Designation) Chapter
(Philanthropy Chair's Email Address)
(Philanthropy Chair's Phone Number)

You fill in the **(bold)** information to correspond to your chapter.

SPONSORSHIP LETTER EXAMPLE



Alpha Epsilon Pi
DEVELOPING LEADERSHIP
for the JEWISH COMMUNITY



Alpha Epsilon Pi, **(Chapter Designation)** Chapter
(House Address or Chapter Location)

(Date)

Dear **(Local Business Owner)**,

The brothers of the **(Chapter Designation)** Chapter of Alpha Epsilon Pi at **(University Name)** are proud to present our **(Number of Years)** annual **(Event Name)**, our philanthropic event. On **(Date of Event)**, we will be holding a **(Type of Event)** on campus. All of our brothers will also be hard at work out in our community asking for donations. All proceeds from our event contribute to AEPi's Repair The World Fund, which supports Jewish organizations all over the world.

Our brothers pride ourselves on practicing the Jewish ideal of Tikkun Olam, or Repairing the World. We recognize the role the global Jewish community has played in shaping our lives, so we join AEPi brothers from chapters all around the world in raising money through our Repair the World Fund to contribute \$100,000 each to three Jewish organizations: United Hatzalah, The Jaffa Institute and the Israel Cancer Research Fund. we will be raising \$300,000 for these amazing organizations! Please visit <https://www.aepi.org/philanthropy/#official-philanthropy> for more information about our event, our philanthropy beneficiaries, and the mission of AEPi's Official Philanthropy Program.

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Sincerely,

(Lieutenant Master's Name)
Lieutenant Master, Alpha Epsilon Pi
(Chapter Designation) Chapter
(Lieutenant Master's Email Address)
(Lieutenant Master's Phone Number)
(Philanthropy Chair's Name)
Philanthropy Chair, Alpha Epsilon Pi

(Chapter Designation) Chapter
(Philanthropy Chair's Email Address)
(Philanthropy Chair's Phone Number)

You fill in the **(bold)** information to correspond to your chapter.

THE STICKY NOTE METHOD



Alpha Epsilon Pi DEVELOPING LEADERSHIP *for the JEWISH COMMUNITY*

The Sticky note Method Step-by-Step

Materials:

You need a bunch of sticky notes / post-it notes and something to write with.

It helps to use just one size and one color sticky note. However, that's not vital — use what you have as long as they are large enough to write on.

Step 1 – Brainstorm:

Ask the Brothers to write an event idea on each sticky note, one event for each sticky note.

I repeat one thing per sticky note.

As you brainstorm:

Do not analyze. Do not consider. Do not research. Do not check the spelling. Do not put sticky notes up on a whiteboard as you brainstorm. Do not place each one on a whiteboard and then write on it. Do not organize them. Do not put specific thoughts on one color sticky note and others on a different color. Do not discard events that don't fit or because they won't fly.

Just dump all of those ideas, events, thoughts onto sticky notes.

Give the Brothers a limit (or not) and have them keep going until they either hit that limit or give up.

Next:

Find a wide-open and smooth space (so the sticky notes will stick and stay). A clean whiteboard, conference table, window, or door often works well.

THE STICKY NOTE METHOD



Alpha Epsilon Pi

DEVELOPING LEADERSHIP
for the JEWISH COMMUNITY

You can also create space by taping flipchart paper on walls, windows or doors, or even whiteboards. This has the bonus of being easily transported later.

Step 2 – Layout the sticky notes and group them:

Place the sticky notes onto the open space. Start by placing them randomly. As you add more sticky notes, some form of grouping will become apparent, often by topic.

Move sticky notes into those now-apparent groups but keep the grouping relatively loose until you have placed all of the sticky notes. Do not try to decide if the set is “correct.” Feel free to use different kinds of groups, too, don’t try to make them consistent.

Throughout this step: physically step back so you can see the whole. Move stuff around as needed.

You may find some sticky notes created during the brainstorm do not have a topic or category to which they belong. Add those topics and categories now.

Move sticky notes around as needed. Put any that don’t fit off to one side. Put any sticky notes covering an introduction or close off to one side, too.

When the sticky notes do not fit an objective or goal:

No matter how well considered the objectives and goals were, you may find the brainstormed sticky notes don’t quite fit. This occurs in two situations:

(1) The most common event is the original objectives/goals weren’t quite right.

If the bulk of the content sticky notes make sense, pull the misfit objectives down, so they don’t distract you—circle back to these in Step 6 (they often just need edits).

(2) The brainstormed sticky notes are not right.

THE STICKY NOTE METHOD



Alpha Epsilon Pi DEVELOPING LEADERSHIP *for the JEWISH COMMUNITY*

It happens! If you're sure the objectives/goals are right, take a break — walk away for a few minutes.

Step 3 – Organize, including flow:

Once you have the sticky notes laid out in rough groups, clean up the groupings, and make them consistent, adding or removing sticky notes as needed.

Now organize the groups into a flow; events that definitely sound the same or are the same - group them as one.

Step 4 – Talk to the Brotherhood:

Start voting! Tell the Brothers they have only X amount of votes, and then go event by event and have them vote. Once the “top events” are selected - ask which Brothers wrote it.

Step 4 – Assign responsibilities:

Once you identify the Brothers behind the event, assign them to plan it - you know the brotherhood wants it, and those brothers who came up with it are invested in it.

Ta-Da

That covers the sticky note method, except to address what to do with all those nifty used stickies: recycle them, of course.

GOAL SETTING



Alpha Epsilon Pi

DEVELOPING LEADERSHIP
for the JEWISH COMMUNITY

GOAL SETTING

Success cannot be achieved until there is a metric by which to measure your success. In this section, E-board will form long and short-term goals.

5-Year Goals

By visualizing a future that seems far-fetched, we can take steps within our 1-year term to make them more realistic. Five years from now, after everyone has graduated, our vision should be complete.

WHAT DO WE WANT THE FRATERNITY TO LOOK LIKE IN 5 YEARS?

What stats do we want to see as consistent? What events do we the fraternity to be capable of? What assets should the chapter have 5 years from now?

-

WHAT ARE SOME BASIC STEPS WE CAN TAKE TO MAKE THAT HAPPEN?

While we won't be around, what basic steps can we take to make sure our plan is inherited and adapted over time and will still accomplish these goals?

-

1-Year Goals

With the 5-year vision in hand, brainstorm what goals should be set for this year that will make the 5-year plan possible.

WHAT CAN WE ACCOMPLISH OVER THIS YEAR THAT IS CONDUCIVE TO THE 5 YEAR GOALS?

What are the first steps needed? How can we get brothers on board? How can we empower the future?

-

WHAT DO WE WANT TO ACCOMPLISH OVER THIS ONE YEAR TERM?

GOAL SETTING



Alpha Epsilon Pi

DEVELOPING LEADERSHIP
for the JEWISH COMMUNITY

What stats do we want to see as consistent? What events do we the fraternity to be capable of? What goals do we want to achieve?

•

WHAT CAN WE ACCOMPLISH DURING THIS SEMESTER THAT IS CONDUCTIVE TO OUR ONE YEAR PLAN?

What are the first steps needed? How can we get brothers on board? How can we empower the future?

•

WHAT DO WE WANT TO ACCOMPLISH OVER THIS SEMESTER?

What stats do we want to see as consistent? What events do we the fraternity to be capable of? What goals do we want to achieve? What liabilities can we turn into assets?

•

Semester Goals

Now that you have goals for the next year, focus down on what goals you will hit THIS SEMSTER to make the 1-year goals successful.

WHAT CAN WE ACCOMPLISH DURING THIS SEMESTER THAT IS CONDUCTIVE TO OUR ONE YEAR PLAN?

What are the first steps needed? How can we get brothers on board? How can we empower the future?

•

WHAT DO WE WANT TO ACCOMPLISH OVER THIS SEMESTER?

What stats do we want to see as consistent? What events do we the fraternity to be capable of? What goals do we want to achieve? What liabilities can we turn into assets?

•

IDENTIFYING STAKEHOLDERS

There are many people that love Alpha Epsilon Pi and want to see our fraternity and our mission of creating the future Jewish leaders of the world succeed. Because of this, at your local campuses and communities there are a number of individuals and organizations that we can work with to help improve our programming, get funding, and even new names of people we want to rush. Remember nothing in life is free and many of our friends and partners will ask for something in exchange for these things, this is the basis of business partnerships as well as professional ones. The below worksheet is to help you think of stakeholders, and what we could want from them but also what it is that we can provide in exchange.

There are many different stakeholders some ones to think about as you work through this sheet are: Other Greek organizations, Alumni, Jewish organizations (both on and off Campus), cultural groups, religious groups, national partners, community partners (local restaurants and shops), etc.

In some cases, you will start by asking "What do we need?" and then take a step back and identify who in your network can satisfy those needs.

Who	What we want from them?	What can we give in return?

EXAMPLE ACADEMIC PLAN

Academic Guidelines 2021

ΦΣ Colony/Chapter

AEΠ Fraternity

University Name

2021

In order to maintain academic excellence within the **AEΠ** fraternity brothers will be required to adhere to the following guidelines. These standards are set within the constitution under **Article two section five**:

❖ Minimum Grade Point Average

- Members must have a GPA of **2.7** or higher to remain in Good Standing.
- All members/new members shall strive for a **3.0 GPA** in order to be eligible for such privileges as:
 - Becoming a Big Brother
 - Running for an Executive Board Position
 - Serving as Academic Chairman
- Brothers who do not meet the minimum requirement can motion to make an appeal to the fraternity to run for Executive Board if they do not meet the minimum GPA requirement
- The chapter shall strive to lead in academic success.

❖ Grade Release Form

- All new members and initiated members shall report their GPA's on a semesterly basis. An official grade release form may be required, through the university, to be filed by each member. If campus administration does not require this information a GPA submission will still be expected to be reported to the Academic Chairman in the form of an up to date screenshot of GPA

EXAMPLE ACADEMIC PLAN

and credit hours from the university database. Simply giving an estimate will not be accepted.

❖ Study Hours

- Time spent working with tutors, group study halls, computer centers, studio work, theater workshops, Practicing instruments or voice, Etc. may be considered as study hours.
- Study Hour Goal:
 - All members are expected to strive for a minimum of **ten** study hours per week.
 - Weekly fraternal study hours are available from **6:30-9:00 pm every Thursday within App Hall room 161.**
- Required Study Hours:
 - Brothers who hold a GPA below the fraternity goal of 3.00 will be required to attend fraternal study hours on a weekly basis. An Academic Committee member must sign off on these hours to ensure good standing with the fraternity.
 - Other alternatives for study hours may be approved by Executive Board.
 - A brother who fails to attend required study hours for more than two weeks will be placed on social probation for a two week minimum or until compliance is met. In special cases Executive Board may move to place a brother on Fraternal suspension in order to enforce this requirement.

❖ Academic Success

EXAMPLE ACADEMIC PLAN

- All brothers will strive for academic excellence. To this end it is required that class be attended on a regular basis. During class hours brothers will remain focused, engage in class discussion, and attempt to ask questions in regards to the topics being taught. Assignments should be submitted in a timely fashion and steps should be taken to achieve the highest score possible.
 - Assistance may be obtained through the brotherhood by reaching out to the Academic Committee, or by contacting on campus resources listed below.

❖ Campus Resources

- The Academic Committee shall maintain a list of members by major to tutor members if assistance is needed. If more extensive help is needed, the Academic Chairman may assist in finding capable university tutors.
- The Academic Committee shall also maintain a list of campus resources available to students so that members/new members will have this information if needed.
- Resources include but are not limited to: Departmental Help Labs, LEAD Tutoring, University Tutorial Services, General Math Help Lab, Accounting Lab, University Writing Center, Academic Advising/Consultation, Career Exploration, Counseling and Psychological Services, Wellness and Prevention Services, Early Intervention, Career Development Center, Interdisciplinary Tutoring/ Peer Academic Coaching, Library Research Assistance, Office of Disability Services, Student Leadership Center, University Recreation, and Campus Activities.

❖ Scholastic Recognition

- Most Improved GPA for the semester - Brother that increases their GPA in that specific semester by the highest margin will receive a \$50 dollar scholarship

EXAMPLE ACADEMIC PLAN

- Best GPA for the semester - Brother with the highest GPA for the semester will receive a \$50 scholarship
- Monthly Academic Excellence Initiative - A \$5 gift card given to the brother who exceeded academic expectations

❖ Academic Improvement Plan

- All members who do not maintain the individual minimum required GPA of 2.7 shall meet with the Academic Chairman to develop an individual academic improvement plan. Executive Board will be notified of members who fail to meet with the Academic Chairman or maintain their individual academic improvement plan.

❖ Academic Communication to Parents

- At the end of each spring semester a communication (letter or email) shall be sent to the parents of all members/new members in March of each year which defines the minimum academic expectations for all Alpha Epsilon Pi brothers, provides the all-men's and chapter's GPA results. Individual member academic results shall **not** be included as part of the required information.
 - All Academic acknowledgements will be outlined in the newsletter with said the receiving brother's consent

❖ New Member Assistance

- Academic Committee will ensure that new members shall be provided special assistance to maintain a productive academic lifestyle.
 - New members are required to participate in a minimum of 10 study hours a week. This will be signed off on by the Academic Committee to ensure this standard
 - Academic Committee will maintain an open-door policy on providing campus resources and academic assistance

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HOLMES MURPHY FRATERNAL PRACTICE

EVENT PLANNING GUIDE



The goal of this guide is to help you think critically around event planning. Prior to planning an event, we encourage you to review the risk management policy of your respective organization and campus expectations so you have a full understanding of the policy and expectations around event planning.

While following the guidelines outlined in the guide will help to make any event safer, we recommend they be expressly followed when alcohol is present while on chapter premises or during a fraternity/sorority event, in any situation sponsored or endorsed by the chapter, or at any event an observer would associate with the fraternity.

For any questions around event planning, policy clarification, contract review, etc. please reach out to your national/international organization for further assistance. Throughout the guide the phrase "suggested organizational guidelines" is used which infers what many organizations might use as policy / procedure language; however, it is best to compare this information to your national/international risk management policy.

WHAT CONSTITUTES AN EVENT?

Defining an "event" is often challenging; however current suggested organizational guidelines define this as "while on chapter premises or during a fraternity event, in any situation sponsored or endorsed by the chapter, or at any event an observer would associate with the fraternity."

Determining if the Event is on "Chapter Premises"

Is the event being hosted in your chapter house or a university-provided meeting space? Y N

If so, every event you host there is considered a chapter event.

Is the event being hosted in an on or off campus location where you traditionally hold your events? Y N

If so, events you host there would probably be considered a chapter event.

Applying the "Reasonable, Objective Observer" Standard

The following factors are considered when determining whether an event could be considered an event by a reasonable, objective observer.

Is the event being hosted or planned by one or more members of the chapter and supported by the Executive Council? Y N

Is the event financed by the chapter and/or being hosted on chapter property? Y N

Is the event being hosted or planned by one or more members and supported by members/associate/new members? Y N

Does the Executive Council have prior knowledge of the event? Y N

Is the event listed or advertised on the chapter website or social media accounts [e.g. Facebook, Twitter, etc.]? Y N

Do online invitations refer to the organization [e.g. Facebook events]? Y N

Is the event listed on a chapter calendar [public or private]? Y N

Will the event be announced at a chapter meeting? Y N

Will members of the Executive Council be in attendance? Y N

Will the event be marketed over the chapter listserv? Y N

Are members attempting to rename the event in order to give the appearance that it isn't associated with the fraternity? Y N

If guests were stopped on their way to the event, would they say they were going to a the "XYZ" event? Y N

Is the event actively or passively endorsed by a majority of the active chapter? Y N

Have members of the chapter lied about the event? Y N

EVENT DETAILS

1. Who is planning the event?

Organization:

Name:

Officer Title:

Email:

Phone:

2. Name of event:

3. Location of event:

Chapter Property (Either fraternity or university owned)

Rented Facility (Hotel, Restaurant, etc.)

Member(s) Residence

Other:

4. Date of Event:

5. Beginning time of event: AM PM

Ending time of event: AM PM

6. Purpose of event:

Recruitment

Social/Mixer

Formal

Philanthropy

Service

Other:

7. Which best describes the event below? Check all that apply.

Dry event (no alcohol)

Member Event Only

Fundraiser

BYOB

Member and Date Event

Event with more than one fraternal organization

New member event

Sport

Third Party Vendor at chapter facility

Parent Event

Event with non-fraternal organization

Recruitment

Service

Event with one other fraternity/sorority

Event with more than one other fraternity/sorority

Event with one other non-fraternal student group

Event with more than one non-fraternal student group

8. The activities below could be considered high risk events. Does the planned event contain any of the following?

Bring your own gun (trap/skeet shooting)

Sky diving/ parasailing/bungee jumping

Boxing tournament

Building of temporary structures

Pools

Mechanical Bulls

Bounce Houses/Inflatables

Slip & Slides/Any other water feature

Obstacle course

Contact sports (e.g. football, rugby)

4

- Bonfires
 - Tug-o-war
 - Rock Climbing
 - Team building events that include make-shift ropes courses, trust falls, blindfolded guided walks (etc.)
 - Other:
- Events take place at heights more than one to two feet from the ground
 - Event with live animals present (e.g., rodeo, petting zoo).

9. Have any written contract or agreement been signed for any part of this event? **Y** **N**

- Food caterer:
- Security guards:
- Bus/transportation company:
- Third party vendor:
- University facility:
- Hotel venue:
- Sports field:
- DJ:
- Band:
- Artist:
- Restroom and Waste Management:
- Other:

HOW WILL ALCOHOL GET TO THE EVENT?

Common organizational recommendations allow chapters to host events with alcohol in one of two ways. *Please consult your national/international risk management policy for additional guidance and policy information.*

- BYOB [Bring Your Own Beverage]**
Everyone brings their own alcohol, including members, new members, guests, and alumni who are over the age of 21
- Third-Party Vendor [Bars, Restaurants, Catering Companies, Hotels, Etc.]**
Contract with a licensed establishment or caterer to provide a cash bar and/or a licensed location to host your event.
- Dry Event [No alcohol will be present]**

MAKING BYOB EVENTS WORK

[See [BYOB Checklist](#)]

- 1 // Are there any university or Fraternity/Sorority policies that deal with BYOB events on campus? Y N
Are there any university or Fraternity/Sorority policies that deal with BYOB events off campus? Y N

If so, what do those policies say? [Do they require a specific check-in procedure? Do they limit the number of drinks a guest can bring?]

- 2 // All members and guests should be "carded" at the door to verify their age. Who is checking members' and guests' IDs at the door?
- Chapter members
 - New members [NOT recommended unless chapter members are also participating]
 - The campus police provide someone to check IDs
 - The chapter has hired a security company [see [Security Vendor Checklist](#)]

- 3 // How are you marking the guests, members, and new members who are of the legal drinking age [i.e. 21 and over]?
- Wristbands that have been dated and marked for that event
 - Specific hand stamp that is unique to the event
 - Other [Describe]:

- 4 // How many drinks will you allow each person of legal drinking age to bring to the social event?
Common organizational recommendations state no hard liquor and a reasonable limit on the amount and types of alcohol (i.e. 6-pack of beer, 1 bottle of 750 ml wine, four pack of wine coolers/ciders/malt beverages, etc.)
- Beer: #
Wine Coolers: #
Ciders: #
Wine: #
Malt Beverages: #
Other: #

- 5 // How will you manage the service distribution center?
- Where will the service distribution center be located?
Common organizational recommendations suggest you establish one centralized location [not a member's room] for checking in and distributing alcohol.
- How many sober members will be assigned to work the service distribution center?
- Which best describes the sober monitors? Check all that apply:
- Chapter members
 - New members
If you utilize new members, it is recommended it is in conjunction with members.
 - The university provides someone to distribute alcohol
 - The chapter has hired a vendor to distribute alcohol

How many drinks will a member or guest be permitted to take at a time?

6

6 // How will members and guests check in and collect their alcohol?

Ticket System

Each member/guest is given one ticket per drink s/he checks in at the party.

The tickets are personalized with the type of drink the guest brings [e.g. Miller Lite, Smirnoff Ice, etc.].

The name of the attendee is written on the tickets.

The member/guest's drinks are delivered to the service distribution center by a member who is working the social event.

The member/guest redeems tickets [one at a time] for his/her drinks at the bar.

Punch Card System

Each member/guest is given one punch card that has marks for each drink s/he checks in at the party.

The punch card is personalized with the type of drink the guest brings [e.g. Miller Lite, Smirnoff Ice, etc.].

The name of the member/guest is written on the punch card.

The member/guest's drinks are delivered to the service distribution center by a member who is working the social event.

The member/guest's ticket is punched or marked at the bar each time s/he claims one of the drinks s/he brought.

Other [Describe]:

7 // How will you monitor that members, new members, and guests are only drinking the alcohol they brought and checked in at the social event?

8 // Will leftover alcohol be discarded or made available for pick up the next day by those who brought it to the event?

PLANNING A THIRD-PARTY VENDOR EVENT

What is a Third-Party Vendor?

Examples of Third Party Vendors include bars, restaurants, catering companies, hotels, etc. *Third Party Vendors are NOT individuals who work as bartenders.*

Planning the Event

1 // Are there any university or Fraternity/Sorority policies that deal with Third Party Vendor events on campus? Y N

Are there any university or Fraternity/Sorority policies that deal with Third Party Vendor events off campus? Y N

If so, what do those policies say? [Do they require a particular amount of insurance? Do they limit the type of alcohol that can be purchased?]

2 // Have you reviewed your chapter's contract with the Third Party Vendor? *It is recommended that you reach out to your headquarters for contract questions and review.*

The contract should be signed and dated by both the person authorized by your respective organization (i.e. chapter president, advisor, etc.) and the vendor. In doing so, both parties understand that only through compliance with these stipulations will the chapter be in compliance with Inter/national fraternity requirements.

The contract with the Vendor should:

CERTIFICATE OF INSURANCE:

Be properly insured with a minimum of \$1,000,000 of general liability insurance, evidence by a properly completed certificate of insurance prepared by the insurance provider. (You can request a copy of the certificate of insurance.)

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

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

LICENSE:

Be properly licensed by the appropriate local and state authority to sell liquor on the premises where the function is to be held. (You can request a copy of this license.)

CONTRACT:

The contract should only be executed in the name of the undergraduate chapter (ex. Beta Kappa Chapter of XYZ Fraternity).

The venue should assume in writing all responsibilities that any other purveyor of alcoholic beverages would assume in the normal course of business, including but not limited to:

- a) Per-drink sales only, collected by the vendor, during the function;
- b) Checking identification card upon entry;
- c) Not serving minors;
- d) Not serving individuals who appear to be intoxicated;
- e) Maintaining absolute control of all alcoholic containers present;
- f) 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);

- g) Removing all alcohol from the premises;
- h) Facility provides security for the event.

In addition; the contract should NOT include the following:

- a) Drink specials for members/guests as part of the room rental fee
- b) A set amount of free alcohol [e.g. 10 free pitchers, 40 free well drinks, two free drinks per member, etc.]
- c) A minimum amount of alcohol sales during the event
- d) Free drinks for officers and organizer or drink specials

Contractual indemnification language should be in favor of the chapter or at a minimum it should provide mutual indemnification. (Think of it this way, if you hire a catering company that is responsible to check IDs and serve alcohol, the vendor should defend the chapter if they fail to do what they were paid to do, which results in a claim or lawsuit.)

Confirm the TPV's liability policy includes a Waiver of Subrogation Clause favoring the Chapter.

The Chapter should be added as an Additional Insured on a primary basis to each TPVs Liability and Auto Policy.

Obtain proof that Workers Compensation coverage is in place for their employees.

Obtain a Certificate of Insurance from TPV confirming required coverages and Additional Insured protection is in place.

3 // All members and guests should be "carded" at the door [and again at the time of purchase] to verify their age. Who is handling this at the door?

- The Third-Party Vendor *[Recommended]*
- The chapter has hired a security company [see [Security Vendor Checklist](#)]
- Chapter members
- New members *[NOT recommended unless chapter members are also participating]*

4 // How are you marking the guests, members, and new members who are of the legal drinking age [i.e. 21 and over]?

- Wristbands that have been dated and marked for that event
- Specific hand stamp that is unique to the event
- Other *[Describe]*:

BUILDING A GUEST LIST

1 // Are there any university or Fraternity/Sorority policies that limit the number of guests per member for chapter events? Y N

If so, what do those policies say?

2 // Do the math. Suggested organizational guidelines are **two to three guests** per member/new member at events.

How many members and new members do you plan to have at the event?

How many guests per member /new member will you allow at the event?

This is the total number of guests you can invite to your social event.

The total number of attendees [members and guests] should not exceed fire code capacity for the venue.

=

3 // Figure out how members will add names to the guest list. [see [Building A Guest List](#)]

Spreadsheet or Sign-Up List

Create a spreadsheet and allow members to add guests' names.

Bring the list to a chapter meeting, post it online, or hang it on a bulletin board in the chapter facility.

Each member and new members' name should be on the list next to a blank space for each guest they're allowed to invite [e.g. two guests per member/new member].

Numbered Invitations

Distribute numbered invitations to each member/new member to give to his guests.

These invitations should be printed professionally or created in a way so they can't be easily copied. Tickets cannot be sold or bartered.

Keep a list with each member/new member's name on it and the numbers of the invitations they were given.

During the event, keep a sign-in sheet at the door and write the guest's name next to the invitation number as s/he turns in the invitation.

Closed Facebook Event

Create a closed [non-recurring] event with a specific start and end time.

Do NOT allow friends to extend the guest list.

Set the Privacy to "Invite Only."

A designated officer [e.g. Risk Management Chairman] should be set as the Host and administrator for the event.

Each member/new member should submit the names of guests to the Host for invitation to the event OR the Host should designate a specific period of time during which members will be given access to add guests to the event.

Other [Describe]:

4 // How many hours in advance will the guest list be closed?

Suggested organizational guidelines recommend the guest list be closed at least 24 hours prior to the event.

MANAGING THE EVENT

Theme

1 // Does the event have a theme? Y N

If yes, what is the theme?

Event themes should NOT be disrespectful or degrading to any person or population. When selecting a theme, ensure it:

- Does NOT rely on the stereotypes of certain groups.
- Does NOT encourage offensive dress or costumes.
- Does NOT stereotype men or women.
- Is NOT sexist. If you're unsure, try interchanging the word/theme with a racial word/theme.
- Is NOT centered on making fun of a particular group of people, culture, or organization.
- Does NOT lend itself to members, new members, or guests taking the theme to a place that is disrespectful or degrading.

Sober Monitors [see [Sober Monitor Resource](#)]

1 // Who will your officer in charge be for the event?

2 // How many sober monitors will you have at the event?
Suggested organizational guidelines are one sober monitor for every 15 attendees.

3 // What is the system/process for selecting sober monitors?
Suggested organizational guidelines utilize a fair ratio of brothers/new members and not using new members only.

4 // List the names / phone numbers for the assigned sober monitors.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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5 // How will you identify sober monitors during the event so a member/guest could easily recognize them?

6 // What are the responsibilities of the sober monitors during the event?

- Check members' and guests' IDs at the door to verify their age
- Manage the guest list at the door
- Mark the guests, members, and new members who are of the legal drinking age [i.e. 21 and over]
- Monitor members' and guests' policy compliance
- Other [Describe]:

11

Transportation

1 // Will you provide transportation to and from the event? Y N

If so, how?

- Licensed transportation vendor [e.g. charter bus]
- Campus safe ride program
- Pre-paid cab service
- Designated driver program [consult the risk management policy of your organization prior to selecting this option // see [Designated Driver Guidelines](#)]
- Other [Describe]:

2 // What is the process/plan to ensure members/guests utilize the method of transportation both to and from the event?

Construction/Decorations

1 // Will there be any special construction/decorations for this event? Y N

If yes, please describe:

Persons and/or company performing construction and contact information:

Company Name: Contact:

Prevention Questions

1 // How many entrances will there be to the party?
It is safest to only have ONE entrance to the event.

2 // Is this event is planned to exceed five hours in duration? Y N
Please explain why this event will exceed five hours.

3 // Will ample food, other than snacks and non-alcoholic beverages be available? Y N
Who will provide the food?
What food/beverages will be served?

4 // Are glass bottles prohibited from the event? Y N

5 // Will this event involve any physical activity? Y N

6 // Will doors to residential living be locked / secured during the event? Y N

7 // Will you stop the service of alcohol at least one hour before the event ends? Y N

8 // Will you select music that is NOT disrespectful or degrading to a particular group of people or culture? Y N

9 // Will you ensure no illegal drugs and controlled substances are at the event? Y N

12

10 // Will you ensure there are no tables or paraphernalia within the event that are used for drinking games? Y N

11 // Will you ensure the event does NOT involve strippers, exotic dancers, or similar, whether professional or amateur?
 Y N

12 // Please describe any specific prevention plans for the above areas.

Crisis Management Plan

1 // Do you have a crisis management plan in place for the event? Y N [see [Crisis Management Plan](#)]

If yes, please describe:

2 // Will emergency services be readily available at the event? Y N

3 // Who is the officer in charge to contact emergency services?

Name: Phone:
Title: Email:

4 // If the need for assistance arises, who will be responsible for contacting:

- Emergency personnel
- Chapter President
- Chapter Advisor
- House Corporation President
- Fraternity Headquarters
- University Officials

Name: Phone:
Title: Email:

Additional Resources: <http://www.holmesmurphy.com/fraternal/resources/resources-sororities-fraternities/>

Educational credit goes to FIPG, Pi Kappa Phi Fraternity and the North-American Interfraternity Conference for portions of this resource.

No portion of this resource should be used for commercial purposes.

