



# **Delta Sigma Pi**

## **ALUMNI CHAPTER OPERATIONS MANUAL**

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## ADDITIONAL RESOURCES

- [Best Practices Manual](#)
- Bylaws Template ([Word Version](#)/ [PDF Version](#))
- [Meeting Agenda](#)
- [Membership Form](#)
- [Member Survey \(Sample\)](#)
- [Officer Packets](#)
- [Operations Report](#)
- [Planning Tips](#)
- Policies Template ([Word Version](#)/ [PDF Version](#))
- [Recognition Program Guide](#)
- [Scheduling Events](#)
- [VPCR Resource Guide](#)
- [VPCR Database](#)
- [Web Guidelines](#)

## QUICK GUIDE TO RUNNING AN ALUMNI CHAPTER

There is no formula for the perfect alumni chapter. Alumni chapters vary because members vary. You will need to find out what fits best with your members to have your alumni chapter succeed. Keeping the following guidelines will ensure the chapter has the best chance of surviving and maintaining success.

### Stay Active

- Establish a regular meeting/event schedule with at least 4 events a year (preferably gathering about once a month) including one business meeting for the purpose of elections. Publish the events to the chapter as early as possible with a minimum one to two months in advance.
- Submit franchising requirements before the annual deadline (June 30th) each year
- Support local collegiate chapters (recommend professional speakers, participate in service and fundraising activities, and offer advice for chapter operations)
- Don't be afraid to change your chapter structure (such as meetings and events) as membership grows and changes
- Utilize new members on committees and in offices so that current members do not get burned out
- Never stop recruiting

### Communicate Regularly

- Send out monthly newsletter to all alumni chapter members including upcoming dates, membership updates, and more
- Send regular updates about how the chapter is doing to:
  - District Director, Regional Vice President and Provincial Vice President, Provincial Alumni Development Chair
  - Collegiate Chapters (and other Alumni Chapters) in your area
  - All alumni in your area
- Invite local collegiate chapter members to attend events
- Submit articles to the Central Office for *The DELTASIG*

### Support the Fraternity

- Attend National Events including LEAD Schools, LEAD Provincial Conferences, and Grand Chapter Congress
- Promote Delta Sigma Pi by wearing letters at events
- Provide financial support to the Delta Sigma Pi Leadership Foundation
- Encourage members to volunteer for the Fraternity (District Directors, committees, etc.).
- Provide leadership opportunities within your alumni chapter

## **FRANCHISING AN EXISTING CHAPTER**

To be recognized continuously as an alumni chapter of Delta Sigma Pi, the chapter needs to complete franchising requirements between April 1 and June 30 for an upcoming fiscal year\*. For example, to be recognized for the July 2013-June 2014 fiscal year, requirements must be completed by June 30, 2013.

### **Franchising Requirements**

1. Update dues paying members through the Area Alumni Module of Hub. National Bylaws require a minimum of 10 members living in the same general locale.
2. Update Alumni Chapter Officers through the Officers Module of the Hub.
3. Complete “Alumni Chapter Franchising” Form within the Forms Module of the Hub. This includes verifying chapter officers, verifying number of alumni chapter members and uploading the current version of the chapter’s bylaws. An example and template of how to write alumni chapter bylaws is posted at [www.dsp.org](http://www.dsp.org).
4. Once the “Alumni Chapter Franchising” Form has been submitted, the chapter will be invoiced \$25 for franchising fees and \$50 for liability insurance fee. All fees can be submitted via the Dashboard Module of the Hub or directly sent to the Central Office.

\* *Previously chartered chapters are required to franchise annually to maintain their chapter status.*

### **As referenced in the National Bylaws, each Alumni Chapters will:**

- Hold at least four chapter meetings each fiscal year with at least one meeting which a quorum of not less than 25% of the membership shall be present for the purpose of electing officers.
- Have their Executive Committee meet at least four times during the fiscal year.
- Send their President, or elected alternate, to serve as the chapter’s delegate on their Provincial Council at the spring LEAD Provincial Conference.

## PLANNING AND ORGANIZING

### Goal Setting and Planning

As practitioners of business, no one should do a better job of setting goals and planning success than members of a professional business fraternity. Each alumni chapter should set its own goals, which should be consistent with the National goals and the ideals and objectives of our Fraternity. Sharing these goals with the rest of the chapter is vital for their success. Topics for which goals are set should ultimately reach the following objectives:

1. To strengthen the name, purpose and ideals of Delta Sigma Pi.
2. To advance the goals of friendship and maintain the bonds of brotherhood formed in college.
3. To maintain contact with all alumni brothers in the area.
4. To give assistance to nearby collegiate chapters.
5. To support the Fraternity on the local and national levels.
6. To provide a representative vote of alumni on Fraternity matters.
7. To support the programs of the Fraternity, both financially and through active lifetime participation.
8. To provide services to alumni members (including professional development).

Suggested areas for goal setting include:

- Membership recruiting
- Financial profit/growth
- Professional Activities
- Support of National organization
- Submission of chapter award and recognition applications
- Membership participation/involvement
- Collegiate chapter interaction
- Community Service
- Leadership Foundation support
- Participation at Fraternity events

Some of the key ingredients for success include creativity, practicality, and persistence. Looking at ‘why things are the way they are’ can help you determine if they need to change or not. Looking for new ideas or new ways to apply old problems can also be helpful. By looking for strengths and weaknesses in other people’s ideas, you can find ways to improve your own. Don’t forget to plan for contingencies and establish performance measures and milestones as part of your goal. There should also be goals for transitioning the chapter information and current status of the chapter with the officers that will follow in the future.

Goals can be defined as a long-term statement of future accomplishments. Objectives are the statements of activities that need to be accomplished to meet the goal. In other words, they are setting a course of action and answering the what, how, when, where and why questions. Each goal and objective, which the alumni chapter establishes, should meet the SMART criteria. In other words, the goals should be Specific, Measurable, Attainable, Realistic, and Timely.

Document steps taken and the results for later reference and to avoid rework. Make sure that the goals are communicated clearly so that everyone in the chapter can be a part of their successful implementation. Chapters that track performance over multiple years gain the most. As a chapter sees their improvement from year to year, morale increases as the chapter celebrates their successes.

## Measuring Operational Performance

To grow and prosper, all business enterprises must establish basic performance measurement criteria (or metrics) to achieve and sustain such growth and prosperity. Delta Sigma Pi alumni chapters are no exception.

With that in mind, the following items are designed to assist franchised alumni chapters with monitoring and measuring their performance. These standards serve as a framework of tangible performance targets that all alumni chapters should strive to meet. It is not a rigid set of rules to govern the chapter, such as the Chapter Management Program for collegiate chapters, but it is through metrics that an objective assessment of alumni chapter effectiveness can be made. These measurements are also consistent with the purpose of the Fraternity as stated in the Preamble to our Bylaws and exemplify the spirit of leadership embodied in Delta Sigma Pi membership.

As part of planning for the coming year, alumni chapter officers can pick any of the following items to use and apply to their chapter goals:

### \* Membership

- Percentage of annual chapter membership growth (e.g., chapter dues-paid members grow 10% each year)
- Diversity within alumni chapter membership composition (in terms of being inclusive of alumni graduates of multiple collegiate chapters, consistent with both *Policies & Procedures Manual* and *Bylaws*)
- Diversity within alumni chapter Executive Committee membership composition
- Percentage of participating members
- Development of recruiting strategic plan to attract and retain alumni on any or all of these levels:
  - Graduating collegiate brothers from schools in alumni chapter's metropolitan area
  - Alumni residing in metropolitan area, but not currently a member of the alumni chapter
  - Recent graduates or other alumni brothers relocating into alumni chapter jurisdiction from outside areas (either active transfers from other alumni chapters or brothers with no previous alumni chapter affiliation)
- Percentage increase in the number of recovered "Lost Brothers" discovered through investigative research relying on Central Office reporting tool

### \*Programming

- Establishing a regular event schedule that apply to the needs of your chapter members
- Number of collegiate/alumni joint events
- Number of business meetings with documented minutes and quorum of members present (Current minimum requirement is 4 per year)
- Number of community service projects annually with relatively substantial impact
- Number of professional development events annually with relatively substantial impact
- Through the ratings of event evaluations completed by attendees (e.g., on a scale from 1 to 10 attendees provide feedback on chapter events throughout the year, and strive for an average rate of at least an 8)
- Number of participants at chapter events

### \*Region, Province, and National Involvement

- Attendance by a certain number of dues-paying members at each nationally-sponsored fraternal event (LEAD Schools, LEAD Provincial Conferences and/or Grand Chapter Congress) and with delegate representation at Provincial and Congress legislative sessions
- Number of applications for National awards (e.g., Most Outstanding Alumni Chapter, Most Improved Alumni Chapter, Outstanding Community Service, etc.)
- Number or percentage of volunteers/officers in the chapter (e.g., 20% of the chapter membership serve at the Regional, Provincial, or National level as a National officer, committee member, seminar presenter, etc.)

### \*Financial Management

Determine how much money you need to support your yearly budget then determine:

- Percentage increase in chapter revenues
- Percentage increase (to curtail) or decrease chapter operating expenses
- Number of fundraising efforts to support operations
- Percentage of chapter members contributing to the Leadership Foundation
- Percentage of chapter revenues donated to the Leadership Foundation (e.g., 5% of chapter dues revenue is donated to the Foundation)

The “Alumni Chapter Operations Report” is also available for alumni chapters to use as a self-evaluation tool chapter to determine trends, evaluate policies, and identify and evaluate specific operational aspects of your chapter. See [Alumni Chapter Operations Report](#).

### **Transition**

The executive committee of the chapter must plan for the coming year of operation. It is also important that there be proper transition from year to year for the incoming officers. It is important that outgoing officers work with incoming officers during the transition period. This transition will require written documentation of responsibilities so that newly elected officers have a better understanding of their jobs.

As soon as new officers are elected, the President of the chapter should schedule an executive planning meeting to keep the chapter moving in the proper direction.

#### \* Transition Meeting -- What to Cover

- Responsibilities of each officer
- Responsibilities of the Executive Committee
- Review of chapter supplies & existing resources
  - Transfer supplies and files to the new officers (including access to any email accounts, websites, Facebook or other social media accounts, and all other online resources and passwords)
- Establish goals for the upcoming term (include a tentative chapter calendar)
- Establish goals for each office and officer
- Review committee structure
- Discuss problem areas from the past year and discuss how to overcome the issues (e.g. SWOT Analysis)

#### \* Mid-Year Review

Many chapters have found a mid-year review to be effective in planning and improving operations. The above items should be reviewed. The annual meeting and elections should also be discussed. January is a great time to review with your Executive Committee what you can accomplish in the spring and for the remainder of the year. You might consider sharing any adjustments to the goals with the chapter.



## CHAPTER LEADERSHIP: OFFICERS AND COMMITTEES

### Required Officers

Alumni chapter officers must be dues paying members of the alumni chapter. The required elective officers are: President, Vice President-Chapter Operations, Vice President-Collegiate Relations and Vice President-Finance. An alumni chapter may also have as many other elective or appointive officers as it deems necessary (such as VP-Membership and/or Recruiting). The bylaws of each alumni chapter shall prescribe the titles and duties of other officers and shall regulate the election of all officers. It is recommended that officers be elected near the end of the fiscal year for the following fiscal year. The President shall report the names and addresses of newly elected officers to the Central Office within the Officers Module in the Hub. The duties of the officers are fully listed in the *Policies and Procedures Manual*. Brief summaries of each:

\*President -The President will act as the chief executive officer of the chapter and preside over its meetings, oversee the other officers, enforce bylaws and policies & procedures, appoint committees if deemed needed, serve as the chapter delegate at the Provincial Council Meeting and at Grand Chapter Congress, oversee the chapter's professional program as well as chapter recruiting. The President may also appoint committees to handle some of these duties, such as oversight of the chapter's professional programming and recruiting.

\*Vice President-Chapter Operations - The Vice President-Chapter Operations (VPCO) will assist the chapter President and temporarily assume the President's duties in his/her absence, act as the chapter secretary by recording the minutes of meetings, handle correspondence with the Central Office, communicate all chapter activities, maintain membership roster. The VPCO may also work with other officers, such as the VPF, to fulfill duties such as updating the membership roster.

\*Vice President-Collegiate Relations - The Vice President-Collegiate Relations (VPCR) will serve as the liaison to local collegiate chapters, assist with communications between the collegiate chapter members and alumni chapter members, encourage participation after graduation, and oversee the orchestration of Founders' Day and Alumni Day events.

\*Vice President-Finance - The Vice President-Finance (VPF) will oversee the receipt and expenditures of the chapter, prepare of an annual chapter budget, report information to the Central Office as requested, pay the Central Office for franchising fees and chapter liability insurance.

Also be sure to assign:

\*Alumni Contact - The Alumni Contact serves as a communication liaison between the Central Office, general membership, and the alumni chapter. Alumni Contacts are listed on both the national website and in *The DELTASIG* magazine as the official contact for the chapter. The contact handles all general membership inquiries (for recruiting) and also serves as the point of contact for Central Office mailings. The contact is encouraged to share all pertinent news from the Central Office with the other members of their chapter. He/she should also be knowledgeable on the activities of the chapter and eager to recruit new members and should be able to respond to requests promptly. In the event that the position of Alumni Contact is vacant, the duties fall to the President or other officer appointed by the President.

### Executive Committee

The committee establishes chapter policy, the chapter's long-range and operating plans and serves as the research and advisory committee for the chapter. At a minimum, the executive committee consists of the following chapter officers (in order of election): President, Vice President-Chapter Operations, Vice President-Collegiate Relations, and Vice President-Finance. The President chairs the executive committee. The executive committee (officers of the alumni chapter) should meet regularly—planning, arranging, and coordinating the alumni chapter program. Each officer must be a dues paying member, in good standing of the chapter and must reside in the locality where

the chapter is situated. According to our National Bylaws, Alumni Chapter Officers meet at least four times during the fiscal year. The chapter may also wish to elect other officers to assist with the management of the chapter; these additional offices must be included in the chapter bylaws.

### **Additional/Optional Committees**

As in most organizations, the chapter's committees provide the support for programming and member development. The chapter may elect additional officers or the president may appoint committees, as the chapter deems beneficial. The chapter will want to make sure it has enough members to support the number of committees though. Too many committees will leave the members spread thin and could lead to ineffectiveness.

Committees and their responsibilities should be included in the chapter bylaws. Committees may be established as standing committees for a long-term basis or as special task forces to complete specific, short-term projects. The chapter should determine if they need additional committees and what areas they would cover. Some ideas for chapters include the following (note: not all of these committees are needed; work with your chapter to determine your chapter needs):

\* **Membership/Recruiting Committee-** Working with the President (and/or VPCO) the committee will seek out new ways to recruit new members into the chapter and plan programs aimed towards recruiting new members. The committee will also manage potential member/recruiting lists and effectively communicate the benefits of joining the chapter. Since membership will vary from recent graduates to professional members, married to single, as well as age differences, periodic surveys should be conducted to help develop activities for all members. The committee is also responsible for developing programs to motivate current members to attend events and to ensure ways to increase rates of continued membership including additional ways to include members and easier dues reminders/payments. The committee will plan programs that will strengthen the personal bond between brothers by planning social activities that follow the risk management policies outlined in National Policies and Chapter Policies.

\* **Collegiate Relations Committee-** Working with the VPCR the committee will plan programs that further develop relations with local collegiate chapters in the area. The committee will work closely with other committees to insure activities are planned that will strengthen the bond between the alumni chapter and any local collegiate chapters. The committee is responsible for corresponding and otherwise communicating and planning events with the vice president-alumni relations at collegiate chapters in the geographic area.

\* **Professional Activities Committee-** The committee will research and plan programs that will strengthen the professionalism of its members. The committee will also be a liaison to collegiate chapters in promoting the use of chapter members for professional events. The committee will also plan at least one joint professional event that will be beneficial to any local collegiate members.

\* **Community Service Committee-** The committee will research and plan programs that will strengthen the reputation/brand of the chapter in the community. The committee will also promote and encourage members to participate in community service activities individually, with the chapter, and with any local collegiate chapters. The committee may also promote donating money to the Leadership Foundation.

\* **Finance Committee-** Working with the VPF the committee will seek out and evaluate new opportunities to generate non-dues income for the chapter and make appropriate recommendations to the executive committee. The committee will also assist the VPF in establishing the budgets for the chapter. The committee also may be responsible for trying to endow an annual scholarship awarded by the chapter (if applicable, you may want to merge the Finance Committee with the Scholarship Committee).

\* **Scholarship Committee-** The committee will promote undergraduate academic achievement and will raise money to create a scholarship through the Leadership Foundation and then work with the Leadership Foundation to maintain the scholarship.

\* Special Events and Projects Committee- The committee will be responsible for planning and organizing specific events or projects such as anniversary celebrations, award applications, or individual social events.

## MEMBERSHIP AND RECRUITING

An alumni chapter is organized to bring together the alumni of a metropolitan or common geographic area for the purpose of fostering a program of activities that will be professionally interesting and will stimulate fraternal brotherhood, thus perpetuating a member's interest in Delta Sigma Pi. An alumni chapter shall consist of not less than 10 alumni members of Delta Sigma Pi, in good standing, and residing in one locality.

Another key factor in membership is the varying participation levels of alumni members (and remembering that they do not need to attend any of the events). In most alumni chapters, a small core group will actively participate in most chapter events. The majority of members in the chapter will probably be moderately active and attend some of the chapter events each year. There will also be a group of members that might only pay dues and attend one or two events each year. Some members may choose to never attend an event but still want to remain connected through chapter communications.

### Eligibility for Membership in an Alumni Chapter

Any member who has graduated, withdrawn from college or the business school, or is no longer enrolled in the college or university where there is a collegiate chapter of Delta Sigma Pi is eligible for membership in an alumni chapter provided he or she is in good standing. To be in good standing, a member must have met all of his financial obligations to the collegiate chapter or the alumni chapter. Members may be associated with more than one alumni chapter, but only those in the locality of the alumni chapter will be counted towards the chapter's membership requirements.

### Recruiting New Members

When recruiting, the chapter will also want to factor in the varying ages and life stages of the alumni members. The chapter will need to vary its programming and recruiting campaigns to help appeal to the broader group of alumni members. A good way to determine what potential members would like out of the chapter is to survey all of them.

Recruiting alumni to join alumni chapters is very similar to recruiting students to join a collegiate chapter. The members might be more widespread in location, but the people you are recruiting are already members of Delta Sigma Pi.

Persistence and follow up are very important in recruiting. Be sure to promptly follow up with any contact you receive from a brother. The chapter should contact all area alumni two to four times a year letting them know about the success of the chapter and encouraging them to attend upcoming events. Recruiting does not have to only occur certain times in the year. The alumni chapter should recruit throughout the year.

The chapter should get its name out in as many possible outlets as possible. The chapter will also want to set up programs on to recruit graduating seniors and to recruit members who have been out of college for many years.

An alumni chapter can use the following to help recruit members into the chapter:

- *The DELTASIG* magazine
- Mailing to alumni in the area
- Email to alumni in the area
- Visit to local collegiate chapters
- Creation of a website
- Starting of groups on Facebook, LinkedIn, etc.

Prepare articles and good quality photographs of your alumni chapter activities and submit them for publication in *The DELTASIG* magazine. Close each article with "any brother in our area wishing to join our alumni chapter,

please contact Brother \_\_\_\_\_”, listing the email address and telephone number. You will be surprised how many calls you will receive from alumni and collegiate members residing or visiting in your area.

#### Additional Ideas:

\*Graduating Senior Program- When recruiting graduating seniors, letters or emails should be mailed to invite them to visit the alumni chapter upon graduation. Some alumni chapters may choose to reduce or waive the first year membership dues for graduating seniors. Many alumni chapters hold cookouts or other activities such as “senior sendoffs” to further acquaint graduates with the alumni chapter.

- Also utilize your VPCR (and/or Collegiate Relations Committee). The relationship built with the collegiate chapters (and their VP-Alumni Relations) throughout the year will assist your recruiting of their graduating seniors.

\*Welcoming New Members- Once a new brother joins the alumni chapter, he/she should be sent a Welcome Packet. This packet (or email) should contain a list of current officers, committees and the committee chairpersons, current members of the chapter, and a calendar of events (this information might be listed in the current chapter monthly newsletter). New members should be verbally contacted and encouraged to participate on one of the chapter’s committees. The chapter may also choose to formally induct new members with the Alumni Chapter Ritual Ceremony.

\*Honorary Membership - Alumni Chapters are encouraged to consider the honorary initiation of business leaders in their community. An alumni chapter may submit an Alumni Chapter Honorary Initiate Request Form through the Hub Forms Module. Once approved by the National Board of Directors, the alumni chapter will need to contact Central Office to reserve a regalia trunk for initiation. It is suggested that the chapter covers the cost of the initiation fees and the badge lease fee for each honorary member. Additional information for planning an initiation may be obtained by contacting Central Office.

## **PROGRAMMING: MEETINGS AND EVENTS**

Alumni chapters must hold four chapter meetings each fiscal year with at least one meeting which a quorum of not less than 25% of the membership shall be present for the purpose of electing officers. *Most alumni chapters also schedule monthly, bi-monthly, or quarterly events.* Additional meetings and events should be scheduled to meet the needs of the membership. Scheduling monthly events will generate opportunities to reach more alumni and above all else will keep the activities of the alumni chapter foremost in their minds.

Events must be scheduled with plenty of lead-time to allow adequate promotion so that members can plan ahead to attend (at least one to two months in advance). Many presenters also require the advance lead-time. Publishing a three to six month calendar of events to the chapter is suggested. Remember in planning your events to coordinate your ideas with the other committees to develop a calendar for the entire chapter.

The demographics of alumni chapter members can be very broad and therefore alumni chapter events should also vary in type. This might mean that participation might be low for individual events, but overall attendance for the year might be very high. The size of the alumni chapter and the financial status of the chapter and its members will also influence the types of events that will best fit the chapter.

When planning events, the chapter should plan well in advance and publicize well. It is recommended that you announce events at least a couple months in advance and no less than 4 weeks in advance. Details to include are date/time, directions to the location, parking information, cost, attire and length of event.

### **Selecting the Date**

The time for holding alumni chapter events is an important consideration, determining to a large measure the success of an alumni chapter. In selecting the meeting date, consideration should be given to the best possible day, place and hour, frequency and duration. It must be recognized that it is impossible to find a date that is suitable to everyone; therefore, a chapter may wish to hold different types of events on different dates.

The chapter may set aside the same day each month for events (like the second Tuesday of every month at 8:00 p.m; third Thursday, etc.). This will make it easier for members to remember when the next event is.

### **Frequency of Events**

Most alumni chapters schedule events monthly or bi-monthly. Scheduling monthly events will generate opportunities to reach more alumni and above all else will keep the activities of the alumni chapter foremost in their minds.

### **Promoting your Events**

Promoting your events is essential to your event's success. Promote the event well in advance and then follow-up those promotions with reminders closer to the event. Make sure the chapter has plenty of time to plan promotions. Below are a couple ways to promote chapter events:

- Distribute a chapter calendar at all events
- Send reminder notices before events
- Include articles on upcoming events in the chapter newsletter
- Send notices to local collegiate chapters
- Encourage member participation at every opportunity possible

Promotions should be targeted at current members, potential members including collegiate chapter members and local alumni not yet chapter members, and any invited guests including family and friends when appropriate.

## Types of Events

The types of events held should be planned to fulfill the interests of the membership. It is imperative that there is an established and varied program for the course of the year; one which will help build and perpetuate the alumni chapter. A variety of activities not only retains the interest of the “regular” members, but also provides an attraction for members who attend occasionally. The chapter should survey its members annually to try to determine the direction for future programs. The chapter should have events for members and their families and an effort should be made to hold at least one or two events a year involving the collegiate chapters in the area.

- Founders’ Day – November 7: So that the spirit and traditions of the Fraternity will be more effectively carried out, there shall be set aside a day known as Founders’ Day, which will fall upon November 7th, the anniversary of the founding of this Fraternity. All chapters should plan an event in commemoration of this date.
- National Alumni Day – April 25: Alumni Day was established so that the accomplishments and achievements of our alumni brothers may be more effectively recognized. This day provides a great opportunity for alumni/collegiate interaction.
- Chapter Meetings: Chapter Meetings are the most important events alumni chapters plan and therefore each should have a specific purpose.
  - Every meeting should be informative and entertaining so that members will want to come.
  - Formal meetings are important so that the chapter can decide on future events and activities and hold elections. These types of meetings might only need to occur once or twice a year.
  - These formal meetings should also allow some networking/social time so that chapter members can increase their fraternal bonds. For example, after business is conducted, the chapter could have a professional speaker or could adjourn to a restaurant for dinner.
- Professional Events: A professional activity should meet the needs of members by developing activities to continue their personal and professional development and to educate them on current business issues. The activities can consist of a wide variety of events including speakers, tours, videos, etc. Chapters can take professional tours of large manufacturing plants, professional sports stadiums, or local wineries. See the [Professional Activities Guide](#).
- Community Service: Community service is the collective effort of a group to help bring about a positive change in some aspect of our society. By utilizing our special knowledge and resources, we can take our community problems and make a difference by improving the quality of life around us. Service is one of the guiding principles of our Fraternity. It increases our feeling of brotherhood. See the [Community Service Guide](#) and the [www.dsp.org/service](http://www.dsp.org/service).
  - National “Make a Difference” Day – fourth Saturday in October: This is a National program to encourage service in communities.
  - Ronald McDonald House Charities – Chapters and members are encouraged to support RMHC by cooking meals for families staying at Houses, volunteering at Houses to meet their greatest needs, donating items for the House’s wish list or raising money for RMHC.
- Social Activities: Alumni chapter social activities are another avenue to promote brotherhood. These activities can also provide interaction among alumni and collegiate brothers. The alumni chapter should organize some of the social activities in such a fashion to allow the member’s spouse and family to attend the events. Members might have a greater interest in attending events if the activities allow for others to participate. In conducting the chapter’s social activities, it is important that the chapter complies with all of the Fraternity’s policies including the Risk Management, Insurance and Conduct Policy to reduce the exposure to risk and liability.

- Collegiate Relations/Activities: Alumni chapters have a great opportunity to promote the aims and ideals of Delta Sigma Pi and the concept of “Deltasig for Life” through various collegiate activities. The alumni/collegiate interaction will produce many benefits to the alumni chapter including program development and assistance with future recruiting efforts. The alumni chapter should work with the collegiate chapters and their national officers to ensure that all Fraternity policies are followed. For a full list of ideas see the [VPCR Resource Guide](#). Some ideas include:
  - Host a joint event to celebrate Founders’ Day or Alumni Day
  - Host a professional workshop for the collegiate chapters
  
- National Events: Each alumni chapter should also send members from the chapter to Grand Chapter Congress, LEAD Provincial Conferences and LEAD Schools. Other local events such as area and regional conferences and Volunteer Leadership Development workshops also provide opportunities for alumni to become involved. Contact your Regional Vice President or other national officers for information on upcoming events and check out [www.dsp.org/events/upcoming-events](http://www.dsp.org/events/upcoming-events).



## **FINANCIAL MANAGEMENT**

### **Checking Account**

As stated in the National Bylaws, each alumni chapter will maintain a checking account in the name of the alumni chapter. The Vice President-Finance and one other officer of the chapter will sign all checks. Make sure your bank is aware of this requirement. The bank will refuse to cash a check if it only has one signature. All funds received by the chapter should be promptly and regularly deposited into this account.

Additional guidelines to follow to minimize financial fraud include:

- Institute checks and balances. Have an officer who is not the VPF review bank statements for unusual activity.
- Prepare monthly bank reconciliations shortly after the bank statement arrives. The reconciliation should be completed by someone that does not write or sign the checks or deposit money.
- Use only pre-numbered checks and store unused checks in a secure place where only authorized members have access.
- Keep all cancelled checks including voided checks to account for each pre-numbered check.

### **Financial Reporting and Records**

It is important that each member is informed of the chapter's financial information. The chapter may prepare financial statements, and they can be as simple or involved as you would like. Establishing a regular schedule of preparing and sharing financial reports to the chapter can help officers plan future events. This can also help members see where their dues are going.

The VPF should present information to the chapter once or twice each year. The following information shall be presented during a chapter meeting:

- Income/Expense analysis by percentage and total dollar amount. For example, prepare two pie charts, one for income and one for expenses.
- Functional Programming analysis of how much money was budgeted for and spent on the major functional areas of chapter programming by percentage and total dollar amount. Major functional areas may include: recruiting, professional, social, scholarship, community service, fund raising, communications, publicity, chapter management, and historical records.
- Dues breakdown analysis of what each dollar of a member's dues is used for, by percentage and total dollar amount. For example, of the \$30 each member pays for dues each semester with \$2 for franchising and insurance, \$6 for recruiting, \$5 for professional events, \$10 for social activities, \$5 for publicity, and \$2 for postage.
- Results of any internal or external audits.
- Year-End financial results.

Visual charts are more appealing and easier to understand when presenting financial data. The charts present a quick overview and will help prepare members for the corporate environment where charts are commonplace. Charts can be prepared in most accounting software, spreadsheets and word processors.

Financial records must be kept by the chapter. Historical records are helpful if referred to when preparing budgets. Records are also required to be maintained for seven years in case of an audit by the Internal Revenue Service.

The data for each year should include the following:

- Accounting ledgers and journals
- Financial statements
- Approved budgets, committee and chapter, including variance reports
- Expense receipts and invoices
- Receipt books

- Check requisition forms with approvals
- Cancelled and voided checks
- Audits and reviews
- Monthly bank statements with reconciliations
- VPF's financial reports presented at each meeting

## **Budgeting**

The budget needs to be established for the chapter each year. Individual budgets should be obtained from each officer or committee and compiled into one chapter budget which should be reviewed by the Executive Committee and approved by the chapter prior to the start of each new fiscal year. July 1-June 30 is the fiscal year of the Fraternity.

As in a business, budgeting is meant to be a guideline to assure the financial success of the chapter. Regular review of both current and past years can help the management of the chapter make important decisions regarding activities and dues. Keep in mind, however, that changes in programming, mailing schedules, postage, and membership numbers can affect how past years' performance can be compared.

One option is for the VPF to compile a quarterly budget in addition to an annual one. Estimates can be used for months where events have not yet been planned. Sharing this information with the chapter can help with making programming decisions. Try to be as realistic as possible when setting the budget figures.

## **Dues Structure**

Each alumni chapter will determine and collect its own dues. No National dues are owed to the Fraternity for individual members, although the chapter is responsible for paying an annual franchise fee and an annual insurance premium. The chapter should establish budgets for recruiting and other items to help offset these cost with dues.

When setting the dues structure for the chapter, keep in mind the number of events (including National events), newsletters, and members the chapter will have for a given year. Some chapters collect a small amount of money from members for dues to help pay for overall costs, but then charge members for each event that takes place. If the alumni chapter would like to pay for events so that members may attend free or for a discounted rate, this must be considered as well. Additionally, keep in mind what would be considered a "reasonable" amount for your part of the country. Most Delta Sigma Pi alumni chapters charge members somewhere between \$20 and \$30 annually for chapter dues. When collecting dues, the chapter should be sure to emphasize the benefits of joining the alumni chapter—including networking professionally, meeting new friends, and having fun!

After a basic annual dues amount is established, additional policies can be discussed:

- Dues may be pro-rated at mid-year so as to encourage recent graduates or alumni new to the area to join without having to face another bill for dues in a short period of time.
- Recent graduates and new alumni may also be given a "new member rate" or even a free membership. As with all financial decisions, impact on the overall budget of the chapter needs to be considered.
- Some alumni chapters offer a discounted rate for paying several years-worth of dues in advance. Accurate record keeping is essential for this option to be successful.
- The chapter may wish to establish a discounted event price for members as opposed to guests at events. This can serve as an additional membership benefit. It can also encourage members to pay early in the year to fully take advantage of this option. The additional fee for non-members, however, should be a modest amount so as not to discourage guests from attending events.
- Requirements for pre-payment to attend functions or specific deadlines may also be set.

## **Event Pricing**

Most social events will have everyone pay their own tab/ticket – they can order and pay for their portions separately.

However, another area to consider while developing a budget is pricing for different events depending on the type of function. Several methods may be used. In the case of restaurant or banquet functions, the cost of the meal, plus tax and gratuity, as well as other items such as meeting room costs, promotional costs, program printing, a DJ and party favors need to be included in the ticket price. Estimating total costs and dividing by the estimated attendance can decide prices for less formal events such as parties or picnics.

Keep in mind as you are determining event costs that the price of an event can affect the number and type of members that attend. For example, collegians are less likely to attend more expensive events. Members with spouses or families will certainly have cost concerns as well. Especially in the case of formal and more expensive functions, advance reservations and payments can help assure a smooth-running event. People who have paid in advance for a function are also more likely to attend as opposed to someone with just reservations. As mentioned earlier, reservation policies should be developed that help the chapter avoid problems with people who do not attend after making a reservation, or make a reservation past the deadline. For example, refunds should be offered only if the no-show does not incur a cost to the chapter.

Beware of over-guaranteeing commitments for banquet events! This is a recurring problem area for enthusiastic alumni leaders that can lead to severe financial challenges.

## **Fundraising**

Yet another area required in budgeting is fundraising. This can be done to raise funds for the chapter treasury, or to make a charitable donation. Determine if your chapter needs to raise additional funds to offset your chapter's costs/goals. Fundraising events should be realistic in scope and well planned. The events should also be those that the entire membership can support. Set simple and clear fundraising goals. The chapter may not accept revenue from sales of any product or service that violates a state law, federal law, university policy, or the Delta Sigma Pi Risk Management, Insurance and Conduct Policy.

Details on fundraising ideas and planning can be found in the [Fundraising Guide](#).

## **Reimbursements/Receipts**

Every business has policies for reimbursement of expenses, payment of invoices and cash receipts. Your chapter should operate with the following guidelines to help ensure chapter funds are used for chapter expenses. You may choose to include purchase procedures and reimbursement policies in your chapter's policy and procedure guide, or prepare the procedures so each chapter member is aware of chapter practices.

Tips for reimbursements and payment of invoices

- Always require original invoices and receipts. Copies can easily be changed without being detected.
- All invoices must be approved for payment by the responsible chairperson.
- Use a check requisition form prior to any cash expenditure. Check requisition forms must be submitted to the VPF after the expense was incurred. Prompt submission and payment will allow the chapter to better evaluate its cash flow. Please see below for a sample form.

<b>REQUEST FOR CHECK</b>	
DATE: _____	
PAYABLE TO: _____	
DATE NEEDED: _____	AMOUNT: _____
PURPOSE: _____	
_____	
_____	
<b>To be completed by officers:</b>	
APPROVAL: _____	ID#: _____
ACCOUNT: _____	DATE PAID: _____ CHECK #: _____

- Reimbursement of expenses to a chairperson must be approved by the President. No member may approve his/her own reimbursement.
- The VPF is responsible for making sure appropriate documentation and approval is attached to each check requisition.
- The VPF is also responsible for comparing the expenses to the budget submitted for that event. By signing the check requisition form, the VPF is providing the final approval for payment.
- Any unbudgeted expenses must be presented to the chapter for approval. If an unbudgeted expense is anticipated, it is best to get the chapter’s approval before the expense is incurred.
- If a chairperson exceeds his/her budget by a stated amount or percent without prior approval, full reimbursement may be denied. Suggest they sponsor a fund raising activity to cover the overrun.
- Avoid paying cash for expenses out of any cash proceeds. Writing checks for all expenses will provide better documentation for future reference.
- The invoice should be marked “Paid” with the date and number of the check written on the invoice. This will help prevent duplicate payments.
- A positive cash balance must be maintained at all times and should allow for incidental expenses. The VPF is responsible for maintaining the positive cash balance.
- As a way to manage your expenses, offer a reward to members for cost saving actions and/or ideas.

**Cash Receipts**

- The chapter shall enforce a policy which requires a written receipt to be given to all those members and non-members who submit money to the chapter.
- Pre-numbered receipts shall be utilized. Receipt books can be purchased at an office supply store.
- All receipt copies must be maintained in the chapter records.
- The VPF must deposit the money in the chapter’s bank account within a reasonable timeframe. The VPF must keep a copy of the deposit ticket and indicate where the money came from for future reference.

## **Non-Deductibility Disclosure Requirements**

Another area of concern to chapters is the treatment of donations to the chapter. **Donations to the International Fraternity of Delta Sigma Pi or to any of its chapters are NOT tax-deductible.** Entities under Section 501(c) (7) of the Internal Revenue Code may not offer tax deductibility to their donors. IRS regulations require entities to explicitly disclose this fact. It is very important that any and all solicitations, whether made to the general public or among the alumni of the chapter, clearly state that donations to the chapter are not tax deductible for federal income tax purposes. Additionally, this disclosure may not be buried in fine print—it must be easily readable. Failure to comply with this requirement can result in fines of \$1,000 per day to a maximum of \$10,000. Donations to the Delta Sigma Pi Leadership Foundation are tax-deductible.

## **IRS/Federal and State Tax Information**

Although your chapter and the International Fraternity are organized on a not-for-profit basis, the Internal Revenue Service (IRS) and various states may require the filing of income and/or informational tax returns. All active Delta Sigma Pi chapters are required to file an annual return with the IRS by November 15 each year. Chapters with annual gross receipts of less than \$25,000 are required to file the 990-N (e-Postcard) which is completed for the chapter by the Central Office Staff to insure compliance. If the annual gross receipts of the chapter are more than \$25,000, contact the Central Office at [accounting@dsp.org](mailto:accounting@dsp.org) for more information.

Each chapter, both collegiate and alumni, has its own federal employer identification number (EIN). The EIN is effectively a social security number for businesses regardless of whether or not it has employees. The EIN is also required by banks to open an account. If a chapter is not sure of its EIN, the VPF should contact the Accounting Department at the Central Office where a master list is maintained. If your chapter has verified with the Central Office that the chapter does not have an EIN, the Central Office staff will assist the chapter in obtaining the EIN. Once the EIN is obtained, a copy of the report will be sent to the chapter and it will be added to the master list at the Central Office for future reference.

## **Insurance**

Each chapter has insurance coverage under its own policy issued by Willis North America. Coverage provided automatically to all chapters include the following:

- General Liability – if someone sues you for injury to person or property
- Bond – if a member, employee or volunteer steals funds from Delta Sigma Pi
- Directors and Officers Liability – if someone sues you because of your Delta Sigma Pi business decisions
- Umbrella Liability – same as general liability but provides higher limits of coverage
- Depositor's Forgery – if a non-member alters your checks and cashes them

Further insurance information can be found [online](#).

# COMMUNICATIONS

## Chapter Newsletter

Newsletters can be an integral part of how your chapter communicates with its members, national officers, and other alumni chapters. Several factors need to be considered when deciding how often, what to include, mail or email, or if you should publish a newsletter. These include the purpose, the number of members in the chapter, the cost, the availability of volunteers to create and get the information out, timing of events and the needs of your members.

Many alumni chapters find a monthly or bi-monthly publication comfortably suits their needs. Be sure to include your District Director, Regional Vice President, Provincial Alumni Development Chair and the Central Office on your distribution list. The collegiate and other alumni chapters in your area should also be included. For samples of other alumni chapter newsletters, please contact the Central Office or one of the other chapters in your area.

What to Include: There are no set rules of what to include in a newsletter, so you can be creative. Below is a list of suggestions based on what other chapters include in their newsletters:

- Letter from president and/or other officers
- Summary of last meeting
- Calendar of events including events from local collegiate chapters, other alumni chapters, and National events
- Officer phone and email list
- Articles on current special projects such as a fundraiser or community service event
- Membership highlights or spotlight on members
- Financial report
- Request to bring new members to events
- Self-development articles
- Input from Regional Vice Presidents, District Directors, Central Office or other alumni chapters

## Mailings

Some of our alumni chapters have found that targeted mailings have also been very successful. Sending a flyer or postcard before a specific event such as a general meeting or social gathering can often produce additional attendees. Be sure to include the date, time, location, cost, guidelines for bringing a guest, RSVP requirements, and contact names and numbers.

## Electronic: Email and Internet

Using email, members are able to communicate with each other quickly and inexpensively. Many alumni chapters have developed a web page (including Facebook pages) to make information available to members at all times and to recruit new members. Establishing a group list serve email account that is accessible to all members also helps to keep all members informed on upcoming and current events. Please refer to the Fraternity's [Web Guidelines](#) for additional information.

## *The DELTASIG Magazine*

A substantial part of every issue of *The DELTASIG* is devoted to news of our alumni. The achievements and activities of alumni and alumni chapters make news and are of interest to many readers. This is also a great opportunity to promote your alumni chapter. The VPCO is responsible for submitting items to the Central Office at [magazine@dsp.org](mailto:magazine@dsp.org) for publication. Items for inclusion include business promotions, personal achievements, recent marriages, additions to the family, etc. Photographs of alumni chapter functions and of distinguished alumni are also encouraged. If you submit a photograph, please provide a caption or brief description of the picture.

## INVOLVEMENT AND SUPPORT

### National Events

\*Grand Chapter Congress: The Grand Chapter of Delta Sigma Pi is the supreme body of the Fraternity in which is vested all legislative powers and is composed of the collegiate and alumni chapters of the Fraternity, which are in good standing. The biennial meeting of the Grand Chapter is known as the Grand Chapter Congress. It is at this meeting that the Board of Directors is elected to administer the Fraternity and all laws are enacted.

- Each alumni chapter completing franchising requirements for the Congress year, and in good standing, is qualified to send an official delegate to the Grand Chapter Congress. Each fully franchised alumni chapter is provided one vote. The name of the delegate and alternates should be reported to the Central Office by July 1 during the odd numbered years, using the Grand Chapter Congress Delegate/Alternate Form available on [www.dsp.org](http://www.dsp.org). The delegate must be in good standing and a dues paying member of the alumni chapter they represent.
- Promotional materials and registration information will be mailed to the alumni chapter throughout the year. Efforts should be made to encourage chapter members to participate.

\*LEAD Provincial Conferences: The LEAD Provincial Conferences of Delta Sigma Pi are held annually. Provincial Council Meetings are conducted at each of these conferences.

- Franchised alumni chapters, in good standing, will have a vote on the Provincial Council of the province in which they reside. Alumni Chapters must send their President, or elected alternate, to serve as the chapter's delegate on their Provincial Council at the spring LEAD Provincial Conference.
- Members of each alumni chapter are encouraged to attend their Provincial Conference. Members of alumni chapters can be invaluable in assisting with the planning and execution of this event and can emphasize first-hand the importance of continued Fraternity affiliation after graduation.

\*Other Events: Other local events such as area and regional conferences, LEAD Schools, and Volunteer Leadership Development workshops also provide opportunities for alumni to become involved. Contact your Regional Vice President or other national officers for information on upcoming events and check out [www.dsp.org/events/upcoming-events](http://www.dsp.org/events/upcoming-events).

### Delta Sigma Pi Leadership Foundation

The Delta Sigma Pi Leadership Foundation is an integral part of Delta Sigma Pi. Although it is a separate corporate entity from the Fraternity, it has played and continues to play an important role in the lives of thousands of brothers. The Foundation is recognized by the federal government as a public charity 501(c)(3); therefore, all contributions to it are deductible for estate and income tax purposes, as allowable by law. See the [Leadership Foundation](#) section of the website for more details.

For the Foundation to fulfill its purpose, brothers—especially collegiate members—must benefit. So take advantage of the scholarships and educational and professional programs that Delta Sigma Pi offers to you. The Leadership Foundation certainly wants our Deltasig brothers, including collegians, to give generously when called upon. Through your [support](#), the Foundation will continue to grow and expand its impact on brothers—future leaders of business and commerce.

### Fraternity Leadership and Volunteer Development

- Encourage serving on the national level as a National Officer (Board of Directors member, Regional Vice President, District Director), national committee member, and your alumni chapter leadership & participation. Find more ways to stay involved [online](#).
- Develop leadership within your alumni chapters and collegiate chapters.
- Groom brothers through projects/events, committees and offices.
- Encourage members to apply to be a [Certified Deltasig Leader \(CDL\)](#).

## ALUMNI AWARDS

Several national awards have been developed to recognize the efforts of alumni chapters and individual awards. In addition, each alumni chapter may also wish to present local chapter awards. Ideas for recognition may include membership awards (5, 10, 25, 50 years), service awards and leadership awards. All awards should be presented at an event such as an annual meeting or year-end banquet which is appropriate for recognition of members. Awards should be framed and presented in a professional manner.

### Alumni Awards and Recognition

- Recognize the efforts of your chapter members through individual awards. Utilize awards yearly such as the Anthony Z. Fernandez Distinguished Alumni Service Award.
- Create your own awards such as Collegiate and Alumni Brother(s) of the Year, Officer of the Year, Leader of the Year award, etc. Recognize officers, committee members, etc.
- Promote Service Awards. There are Silver, Golden and Diamond Helmet awards, the Ten Year Alumni Service Award, or you can create an award for chapter members who have 5 or 15 years of alumni service.
- Apply for Fraternity awards or the Alumni Chapter Recognition Program to recognize your chapter efforts.

For additional information on the national awards program and the application requirements and deadlines, refer to the [Awards & Recognition Guide](#). For additional information about the Alumni Chapter Recognition Program, refer to the [Recognition Program Guide](#).

### Chapter Awards and Recognition

- The Alumni Chapter Recognition Program recognizes alumni chapters that operate beyond basic franchising requirements. There are three recognition levels, Bronze, Silver, and Gold.
- The Outstanding Alumni Chapter Award shall be presented annually to the alumni chapter that best promotes the aims and ideals of Delta Sigma Pi through various activities involving the membership of the chapter, collegiate chapters and the International Fraternity.
- The Outstanding Service Award may be presented each year to one collegiate chapter and one alumni chapter of Delta Sigma Pi which plan and implement the broadest and most effective programs of service to others. The relevant publics served may include: Fraternity members, other professional groups, the school of business, students in general, faculty, the university, neighbors, parents, alumni, community members, and the International Fraternity and its affiliated entities.
- The Outstanding Professional Activities Award is presented on an annual basis to the alumni chapter of Delta Sigma Pi that plans and implements the most effective and comprehensive program of professional development focused on practical experience as well as business ethics and integrity.
- The Outstanding Collegiate Relations Award is presented on an annual basis to the alumni chapter of Delta Sigma Pi that most thoroughly integrates an aspect of collegiate relations into overall operations.
- The Most Improved Chapter Award shall be presented each year to the one alumni chapter which faithfully promotes the aims and ideals of the Fraternity and which exhibits the greatest degree of improvement in its general operations, membership support, and professional, service, and fund raising activities.

### Individual Awards

- Anthony Z. Fernandez Distinguished Alumni Service Award: This award was created in the memory of Brother Anthony Z. Fernandez because of his exceptional level of service to the Fraternity. Alumni chapters may select one member each year to receive this award. Recipients are to be selected from those who volunteer an additional level of service.
- Ten Year Alumni Service Award: The Ten Year Alumni Service Award is presented to members of Delta Sigma Pi with ten years or more of membership and a record of support and service to the Fraternity. It



was created to recognize the accomplishments and commitment of young alumni members and encourage new graduates to stay involved.

- Order of The Helmet:
  - The Order of the Diamond Helmet is awarded to members of the Fraternity with 75 years or more of service to the Fraternity.
  - The Order of the Golden Helmet is awarded to members of the Fraternity with 50 years or more of service to the Fraternity.
  - The Order of the Silver Helmet is awarded to members of the Fraternity with 25 years or more of service to the Fraternity.
  
- Deltasig Lifetime Achievement Award: The Deltasig Lifetime Achievement Award is the highest tribute that can be given to a brother. This person is the model Deltasig whom all brothers should emulate as the recipient is the embodiment of the ideal member. Because of this, the nomination process should not be undertaken lightly and should be performed in the most professional manner possible. The Lifetime Achievement Award is presented biennially at Grand Chapter Congress.
  
- Deltasig Career Achievement Award: As Delta Sigma Pi is a professional business Fraternity, the Deltasig Career Achievement Award seeks to honor the brother who has best distinguished himself or herself in his or her chosen field of business, government or education. The Career Achievement Award is presented biennially during non-Congress years.