



MU PHI EPSILON  
International Professional Music Fraternity

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# Alumni Chapter Officer Manual

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# Introduction

This Alumni Officer Manual is to be used by all alumni chapters of Mu Phi Epsilon. Since all alumni chapters are not the same, it may be necessary for each chapter to adapt the contents to fit its individual needs.

When the chapter is small some offices may be combined or even eliminated. But each chapter must ALWAYS have a President and a Treasurer. Reducing the number of officers is a necessity in the small chapter. Good organizational practice would advise that it is wise to involve as many members as possible since “many hands make the work light”. This encourages the development of other members to take over larger responsibilities in time. Under the leadership of the president, larger chapters should be organized into committee for specific tasks.

**Members holding office or committee appointments are more likely to attend meetings and participate in chapter activities than members whose names merely appear on the membership roster!!**

## **BE FLEXIBLE... BE ATTUNED TO YOUR CHAPTER AND ITS SPECIFIC NEEDS**

The Chapter President keeps this complete Manual and makes copies of the pages to give to the respective officers. Each officer is encouraged to keep a record of methods or procedures that have been found useful or particularly applicable to the chapter, keeping in mind that Fraternity By-laws and Standing Rules must always be followed.

Your **District Director** will have a complete copy of this Manual, as will all members of the **International Executive Board**.

# International Executive Board

The elected International Officers constitute the **International Executive Board of Mu Phi Epsilon**. The **International Executive Secretary-Treasurer** and **International Editor** are *ex officio* members of the International Executive Board. The duties of these officers are found in the current **International Bylaws of Mu Phi Epsilon**.

## 2017-2020 International Executive Board

**President** This is the chief executive officer of the Fraternity who welcomes all member correspondence and questions. The President serves as a Director on the Mu Phi Epsilon Foundation Board.

Rosemary Ames (*Omega*)  
21220 St Petersburg Drive  
Venice, FL 34293  
Tel: 508-498-4669  
[President@MuPhiEpsilon.org](mailto:President@MuPhiEpsilon.org)

**1<sup>st</sup> Vice President  
Extension Officer** Contact the Extension Officer regarding establishment of a new alumni or collegiate chapter, or to research the status of existing inactive chapters.

Julia Scherer (*Alpha Kappa*)  
15220 Dearborn St  
Overland Park, KS 66223  
Tel: 816-225-2987  
[ExtensionOfficer@MuPhiEpsilon.org](mailto:ExtensionOfficer@MuPhiEpsilon.org)

**2<sup>nd</sup> Vice President  
Collegiate Advisor** Contact the Collegiate Advisor with any questions, problems, or other needs pertaining to collegiate chapter operations.

Jenny Smith (*Phi Xi*)  
1913 Dana Ct  
Irvine, TX 75060  
214-662-5087  
[CollegiateAdvisor@MuPhiEpsilon.org](mailto:CollegiateAdvisor@MuPhiEpsilon.org)

**3<sup>rd</sup> Vice President  
Alumni Advisor** Contact the Alumni Advisor with any questions, problems, or other needs pertaining to alumni chapter operations.

Marcus Wyche (*Delta Delta*)  
2729 Nicholson St #103  
Hyattsville, MD 20782  
Tel: 301-484-3652  
[AlumniAdvisor@MuPhiEpsilon.org](mailto:AlumniAdvisor@MuPhiEpsilon.org)

**4<sup>th</sup> Vice President  
Music Advisor**

Contact the Music Advisor with questions about fraternity contests or convention music.

Rebecca Sorley (*Kappa*)  
7295 W Road 350 N  
Bargersville, IN 46106  
Tel: 317-885-1103  
[MusicAdvisor@MuPhiEpsilon.org](mailto:MusicAdvisor@MuPhiEpsilon.org)

**5<sup>th</sup> Vice President  
Eligibility Advisor**

Contact Eligibility Advisor with questions about Special Election or about Bylaws.

Terrel Kent (*Beta Zeta*)  
2606 Galvez St  
Baton Rouge, LA 70805  
Tel: 225-772-7384  
[EligibilityAdvisor@MuPhiEpsilon.org](mailto:EligibilityAdvisor@MuPhiEpsilon.org)

**International Editor**

Contact the International Editor about all copy for *The Triangle of Mu Phi Epsilon*

Ellen Sackett (*Phi Tau*)  
1309 East Pecan St  
Gainesville, TX 76240  
Tel: 940-395-1300  
[Editor@MuPhiEpsilon.org](mailto:Editor@MuPhiEpsilon.org)

**International  
Executive Secretary-  
Treasurer (INEST)**

Contact INEST with questions about membership status, financial concerns, or most paperwork. This officer maintains the International Executive Office.

Jess LaNore  
International Executive Office (IEO)  
1611 County Rd B West, #320  
St Paul, MN 55113  
Tel: 888-259-1471  
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[ExecutiveOffice@MuPhiEpsilon.org](mailto:ExecutiveOffice@MuPhiEpsilon.org)

# Structure of the Fraternity

## INTERNATIONAL EXECUTIVE OFFICE (IEO)

The **business office of the Fraternity** is where all membership records are maintained, initiations processed, international dues received and posted; and Fraternity supplies and archives stored. Some Fraternity publications are distributed from the IEO.

## PROVINCES

Chapters of Mu Phi Epsilon are divided into **Provinces** as deemed necessary by the International Executive Board. Provinces host Conventions on a rotational basis – two Provinces per Convention.

## DISTRICTS

Chapters of Mu Phi Epsilon are also divided into smaller geographical **Districts** – within the boundaries of the Province. **District Conferences** are held at least once each triennium.

## DISTRICT DIRECTORS

A **District Director**, appointed by the International executive board, works as the liaison between the Chapters and the IEB. The District Director receives periodic reports from chapters.

In addition, the District Director organizes and presides at **District Conferences** that are attended by both Collegiate and Alumni members; visits Collegiate Chapters annually and Alumni Chapters in the third year of the triennium; keeps in close touch with activities and Chapters in the District; and advises on matters concerning their activities.

## COLLEGIATE CHAPTERS

Collegiate Chapters are established in accredited Universities, Colleges, and Conservatories. **ALL** members of Mu Phi Epsilon are initiated through Collegiate Chapters – including **Special Election** members who will be going directly into Alumni Chapters. (When there is no Collegiate Chapter geographically accessible to initiate a candidate recommended for Special Election, the initiation may be performed by the Alumni Chapter under the name of **Omega Omega Chapter**.)

## ALUMNI CHAPTERS

Alumni Chapters are established in cities, towns and contiguous geographical areas. They consist of initiated members no longer enrolled in school; initiated members enrolled in a school where there is no Collegiate Chapter; and initiated members who, as graduate students, choose to affiliate with an Alumni Chapter instead of the Collegiate Chapter where they attend school. New Special Election members may immediately affiliate with the Alumni Chapter.

# Membership in Mu Phi Epsilon

## CRITERIA FOR MEMBERSHIP IN AN ALUMNI CHAPTER

Any Initiated member of Mu Phi Epsilon who is:

- ✓ no longer enrolled in school
- ✓ enrolled in a school without a Collegiate Chapter
- ✓ a graduate student (note: members enrolled in school for graduate study may affiliate with either a Collegiate or an Alumni Chapter)
- ✓ a Special Election member

is eligible for membership in an Alumni Chapter.

## MEMBERSHIP CLASSIFICATION

- |                     |  |
|---------------------|--|
| <b>A. Resident</b>  | Members pay International dues and local Chapter dues through one alumni Chapter and take part in that Chapter's Activities.   |
| <b>B. Affiliate</b> | Whether you are near to an active alumni chapter or not, you may choose to keep your affiliation active with Mu Phi Epsilon by continuing to pay annual dues as an Affiliate member. |

# Alumni Chapter Administrative Structure

## ELECTED OFFICERS . . .

**provide leadership in Chapter activities, uphold ideals of Mu Phi Epsilon, and promote Musicianship and Friendship.**

The following officers comprise the *Executive Committee* unless the Chapter Bylaws contain a different provision:

- **President**
- **Vice President**
- **Secretary – may have one or two people in this position (Recording and/or Corresponding)**
- **Treasurer**
- **Historian**
- **Steward**
- **Chorister**

Duties of two or more offices may be combined if the Chapter deems appropriate.

## COMMITTEES

Committees and their Chairmen are appointed by the Alumni President as deemed necessary for the work of the Chapter. The President is an ex-officio member of all committees except the Nominating Committee.

- Bylaws
- Collegiate Chapter Advisor
- Finance
- Service, Education, Resource, Volunteer (SERV)
- Membership – Including Special Election
- Mu Phi Epsilon Foundation
- Newsletter
- Nominating – to be elected by the chapter
- Patrons
- Program
- Yearbook

## SUCCESSION

Upon completion of term of office, each officer should give to the successor:

- All materials pertaining to their individual position
- A full explanation of the office



# PRESIDENT

## DUTIES AND OBLIGATIONS

### **Provides Leadership in Guiding Chapter Activities:**

1. The presiding officer of the chapter and responsible for the overall activities of the chapter.
2. Distributes copies of pertinent pages of the Alumni Manual to each chapter officer.
3. In consultation with the rest of the chapter designs service projects to collegiate chapter(s), schools, and community.
4. Maintains and continues traditional chapter projects.
5. Appoints committees and committee chairs to enable the chapter to accomplish its own goals.

**Note:** See *Standing Committees/Chairmen* in the section titled *Committees*.

6. Serves as *ex officio* member on all committees appointed to carry out such activities as agreed upon and supported by chapter vote (except the Nominating Committee).

### **Assists Members in Chapter Activities:**

1. Develops leadership by assigning responsibilities to different members.
2. Encourages musicianship by urging Program Committee to give all members opportunities to perform on formal or informal programs.
3. Urges each new affiliate to become active in the Chapter during first months of membership by giving a committee assignment or special project.

### **Rituals: Uses the 2019 Edition of Ritual Book to remind members of their connection to and membership in the National Organization**

1. **Opening/Closing Ceremonies:**
  - a. Use at each regular business meeting
  - b. Vary with use of alternate closing songs as indicated in *Ritual* and found on the Fraternity website.
2. **Installation Ceremony of Alumni Chapter Officers:**
  - a. Conduct at the Annual Business Meeting (i.e., the last meeting of the year)
  - b. Any newly elected officers not present for the general Installation may be installed when next present at a chapter meeting. A past Chapter President, District Director, International Officer, or other distinguished member may be invited to conduct the Installation Ceremony.

3. **Affiliation Ceremony:**
  - a. Used for members who are new to the current alumni chapter
  - b. May be conducted at regular chapter meetings
4. **Founders Day Ceremony:**
  - a. Used for Founders Day Observance
  - b. *Open* ceremony may include pledges, patrons, or other non-members
5. **Installation of Patrons Ceremony:**
  - a. Performed at any time
  - b. *Open* ceremony
6. **Special Election Ceremonies (Omega Omega Chapter)**
  - a. May be performed by the Alumni Chapter
  - b. Entry Ceremony
  - c. Initiation Ceremony

**Ideals of Mu Phi Epsilon:**

1. Understands and complies with the *International Bylaws of Mu Phi Epsilon*.
2. Purposes and Aims of Mu Phi Epsilon are to be the primary guide for all alumni chapter activities.
3. Builds and develops strong bonds of friendship within the chapter.
  - a. This will increase the loyalty of each member to:
    - i. Other members.
    - ii. the Chapter itself.
    - iii. Mu Phi Epsilon.

**International Business and Activities:**

1. Reads and/or reports correspondence from International Officers, District Director, or International Committee Chairmen.
  - a. Acts when necessary or as requested.
  - b. Delegates assignments requested by such correspondence.
  - c. Distributes instructions and correspondence directed to officers or Chairmen.

**Note:** *Fraternity courtesy expects you to respond (when response is required) within five working days.*

2. Keeps Chapter informed of business and news of Mu Phi Epsilon.
3. Informs chapter of Fraternity business as reported in the **Annual Report**.
  - a. highlights Information of special interest in **The Triangle**.
  - b. makes aware of publicity about Mu Phi Epsilon and members in national magazines, on the Internet, etc.

**Duties within the International Organization of Mu Phi Epsilon:**

1. Submit **all** reports, **on or before** dates indicated on report form, to appropriate officers.
2. Send Chapter Yearbook to all 8 members of International Executive Board and to your District Director. Send copies of all Chapter newsletters to International President, Collegiate and Alumni Advisors, INEST, and all Editors.
3. Respond to correspondence from International Officers and Chairmen within five (5) working days. (Note: some correspondence does not require a response).
4. Stimulate interest in **Founders Day**, planning an observance with other chapters in the area, if possible. (Note: utilize your Founders Day Chair and Committee to do this!)
5. Cooperate in planning for and assure chapter member representation at **District Conference**.
6. Publicize Chapter activities in the community whenever possible.
7. Send any information – of more than local interest – about your chapter and/or your members to the Editor of **The Triangle**.
8. Distribute to Chapter officers all Mu Phi Epsilon materials sent to you for their use.
9. Foster and stimulate support of, and interest in, International philanthropies and projects of Mu Phi Epsilon and its Foundation.
10. Keep a calendar of **deadlines** for:
  - a. International dues
  - b. Officer lists
  - c. Reports
11. Fill out **Chapter President's Report** completely in order to give a valid picture of your chapter's achievements

**Note:** You may not think that your chapter has accomplished very much until you see it all on paper.

**Note 2:** If you are a small chapter, or any chapter that has had to modify your activities from the standard requirements or expectations, please fill out your report regardless!! We are interested in whatever you have done, and the report is vital as a historical document for your chapter.

## PRESIDING AT CHAPTER MEETINGS

Each chapter shall present **six** programs a year – at least two to be public.

1. Order of Business Meeting:
  - a. Opening Ceremony – see *Ritual*.
  - b. Roll call and quorum check:
    - i. Manner of taking roll optional – done by Secretary.
    - ii. Quorum for transaction of business as stated in chapter's bylaws.
  - c. Minutes of previous business meeting – read by Secretary.
    - i. Ask for corrections or additions.
    - ii. Minutes are *approved as read* or *approved as corrected*.
    - iii. **Note:** *There is no motion made to accept the minutes.*
  - d. Correspondence read (or summarized). *Motions arising out of correspondence may be handled at this time, rather than under new business.*

**Note:** *In many chapters, correspondence will come to the President, rather than to the Secretary. If the President has handled the matter, the President would take care of reporting any such correspondence in the meeting.*
  - e. Treasurer's financial report.
    - i. Must include three elements: Receipts, Disbursements, and Balance. **Note:** The Treasurer's report is not "accepted." It is "filed for audit."
  - f. Report of Executive Committee (only if it has met since the last business meeting).
    - i. **Do not** read minutes of Executive Committee; only present recommendations from the Committee.
    - ii. Recommendations may be acted on at this time or under new business.
    - iii. If no recommendations are made, simply report that the Executive Committee met, and regular business was conducted.
  - g. Reports of other officers and committees.
    - i. *Committee member reporting may make the necessary motion, and action may be taken at this time.*

**Note:** *a second to a Committee motion is not needed.*
  - h. Old business.
  - i. New business.
  - j. Affiliation Ceremony for new members – see *Ritual*.
  - k. Closing Ceremony – see *Ritual*.

2. Last meeting of the program year should be the Annual Business Meeting:
  - a. Reports to officers and Committees are presented in written form.
  - b. Installation of new officers – see *Ritual*.

**Note:** Often the last meeting of the year is a public social, where spouses/friends are invited. Materials for new officers should be transferred (An alternative to this plan would be a joint Executive Meeting between old and new Executive Committees, to be held at a different time).

3. A musical program may be planned to follow or precede a business meeting.
  - a. The program should feature chapter members and/or Collegiates whenever possible. Visiting (i.e., non-members) performers may also be used, of course.
  - b. At least two public programs should be presented each year. Any program open to non-members may be considered public.

**Note:** Programs adhering to an annual theme provide interest and continuity and may qualify for the Doepke Award for Excellence in Programming, if application materials are submitted to the Alumni Advisor with the Annual Report.

P R E S I D I N G   A T   E X E C U T I V E   C O M M I T T E E   M E E T I N G

Executive Committee: As determined by the Chapter Bylaws the Executive Committee is composed of the Chapter officers.

**Note:** If the chapter is large enough to have these officers, it is customary to include the Historian, Steward, and Chorister, as part of the Executive Committee. Sometimes it is necessary to eliminate them altogether, or to have people doubling up by taking on more than one office. Committee chairs can also be part of the Executive Committee, depending on the way the bylaws are worded.

Basic Agenda for Executive Committee Meetings:

1. Plan agenda for business meetings.
  - a. Consider officer and committee reports.
  - b. Study needs of the Chapter.
  - c. Recommend actions for Chapter’s consideration.
2. Fill any vacancy in Chapter offices. **Exception:** A special election *must* be held for the office of President.
3. Study issues of fraternity publications for ideas from other chapters which may be adopted by or adapted to *your* chapter.

**Note:** Depending on the individual chapter and its size, needs, etc., it may not always be possible to have large meetings of the Executive Committee on a separate day from the regular business meeting of the Chapter. Instead:

- Have the Executive Committee meet briefly either before or after the regular meeting.
- Use the telephone or e-mail to communicate with the Executive Committee.

## RELATIONSHIP TO COLLEGIATE CHAPTERS &amp; MEMBERS

Using your own ideas and those of the Executive Committee, present ways and means for the chapter to:

1. Cultivate friendship with collegiate chapter members.
  - a. Interest in the Collegiates and their chapter activities will reinforce the commitment of the Alumni to the ideals of Music, Friendship, and Harmony, and can encourage alumni chapter affiliation after graduation.
2. Encourage collegiate chapters to develop loyalty to their Alma Mater, and to cooperate with the school administration.
  - a. Offer alumni assistance – as a chapter or as individuals.
  - b. Attend and support musical activities of collegiate chapters
3. Promote Mu Phi Epsilon in the community through:
  - a. Projects in which Collegiates may participate
  - b. Projects from which Collegiates may benefit
  - c. Publicity for both Collegiate and Alumni projects.
4. Contribute funds to the schools where collegiate chapters are located.
  - a. Award annual scholarships:
    - i. Given to qualified music students, preferably Mu Phi Epsilon members, administered by School of Music
    - ii. Given through other entities to other musicians (N.B. Inter-fraternity agreements prohibit Mu Phi Epsilon from awarding scholarship monies directly, in the name of the Fraternity, to students younger than college age).
    - iii. Give **financial aid** to deserving collegiate members.
    - iv. Raise funds for scholarships by holding events such as:
      1. Benefit concerts
      2. Garage/rummage sales
      3. Fashion shows
      4. Patron donations
      5. Whatever strikes the fancy of your chapter.
5. Recognize the achievements of the collegiate chapters and their members.
  - a. Recognize the *Province Senior Achievement Award* nominee and/or winner, and/or the *Chapter Senior Achievement Award* nominee.
  - b. Honor outstanding collegiate members at the *Founders Day* observance, or any special occasion.
6. If there is no collegiate chapter in the immediate vicinity, try to adopt an isolated chapter elsewhere, using e-mail, the web, and US mail.
7. Maintain a close relationship with the collegiate chapter and members. Suggest alumni members as Chapter *Advisor*. **Note:** If possible, the collegiate chapter should be allowed to select its Chapter Advisor, and to change this Advisor from time to time. Collegiates may need assistance in getting acquainted with potential Advisors.
  - a. The Chapter Advisor serves as the liaison between the Collegiates, the Alumni Chapter, and the District Director.

8. Plan joint activities with the collegiate chapters:
  - a. Founders Day observance, musicales and parties, observance of the anniversary of the chapter's founding, (Rush) recruitment functions.
  - b. Offer homes for: meetings, candidate and/or initiation ceremonies, programs, (Rush) membership recruitment parties.
  - c. Assist with money-making or service projects.
  - d. Maintain or replace initiation equipment.
  - e. Suggest names of Patrons for collegiate chapters and foster good Patron relationships.

P R E S I D E N T ' S C H E C K L I S T A N D A N N U A L R E P O R T

Each spring, the President sends an Annual Report to:

- ✓ The International President,
- ✓ the Alumni Advisor, and
- ✓ the District Director,

making use of the Checklist that is provided as a companion piece to the Report form.

The Report is basically a chronology of the Chapter's activities for the past year, giving the International Officers an insight into the achievements, high points, and - in some cases - the problems that have befallen the Chapter.

As the Checklist states, points are awarded for the goals that are achieved by the Chapters and various awards may be won.

Even if you feel that you and your chapter did not accomplish your goals during the year, please make a point of sending in your Annual Report, postmarked by the June 15<sup>th</sup> deadline stated on the form. This report is the only way, apart from any other direct correspondence between the IEB and your Chapter that the International Officers can keep up to date with your chapter. If your chapter is not meeting its goals or having difficulties, it is just as (perhaps even more) important that the IEB know that.

Please read through the Checklist at various times throughout the year, to ensure that you are working to accomplish your goals.

**Please be sure to use only the current form of the Annual Report.** Information on the report changes each year, and you need to keep up with these changes.

If you need assistance completing the Report Form, please feel free to contact your District Director, the Alumni Advisor and/or the Executive Secretary-Treasurer with your questions. They are always available to help you.

A L U M N I C H A P T E R O F F I C E R S U P D A T E

The Chapter President should submit one (1) copy to each of the following: the IEO, Alumni Advisor, District Director, and International President as soon as possible following the election in the spring. Find the form on the website, fill it out, and submit it.

It is essential, however, that you send in the list **as soon as possible following the election**, so that all IEO mailings are sent to the proper individuals.



# Vice President

## DUTIES OF OFFICE

1. Assist the President
2. Preside at meetings in absence of President
3. Carry out other duties and obligations assigned by President or found in Chapter Bylaws
4. May serve as Program Chair, but this function may be assumed by another committee or chair if the Chapter desires
5. May serve as Membership Chair, but this function may be assumed by another committee or chair if the chapter desires.

**Note:** *(It is inadvisable for the same officer to function as both Program Chair and Membership Chair in the same year.)*

The Membership Chair coordinates the initiation ceremony of Special Election candidate(s) with the Collegiate Vice President of a near-by active collegiate chapter, who oversees their chapter candidates.

**Note:** *if there is no active collegiate chapter in a convenient geographic area the initiation is done by the alumni chapter members and the Greek chapter of initiation is "Omega Omega".*

# Secretary

## DUTIES OF OFFICE

- Records Minutes of All Business Meetings
- Keeps the Official Chapter Secretary's Book

### Minutes should include:

1. Name of Chapter
2. Date and place of meeting – **Year, Month, Day, Hour**
3. Type of meeting: **Regular, Special, Executive Board**
4. Use of Opening Ceremony
5. Name and office of person conducting the meeting
6. Roll Call – number of members present  
*Method of taking roll to be determined by individual chapters*
7. Statement that **Minutes** of the previous meeting were **read** and **approved as read (or as corrected)**, or that the reading was dispensed with, **giving the reason**
8. When minutes are read at the next meeting, note any corrections in the margin
9. Treasurer's Report
10. Officer and/or Committee reports – action taken, if any
11. Name of member **making motion**, name of member **seconding the motion**  
**Complete wording** of the motion  
**Resolution** of the motion, i.e. whether the motion carried or was defeated  
**Motions withdrawn need not be recorded**  
**Motions tabled should be recorded**
12. Special Committee(s) established  
Purpose and how selected (**elected or appointed**)  
Names of Chairman and members
13. Names of newly affiliated members
14. Description of the **musical program**
15. Names of hostesses
16. Hour of adjournment – use of **Closing Ceremony**
17. Minutes should be signed by both the **President** and the **Secretary** AFTER they have been approved as read or corrected

**Minutes must be written carefully, since they are a permanent record of Chapter business, and they become part of the Chapter's permanent records. Minutes should be kept in an official Notebook, clearly identified. Following are general guidelines.**

1. Minutes should be typed (if possible) and a copy should be made available to the president before the meeting via email or snail mail
2. Use full names in all instances
3. Omit unnecessary details
4. Write the minutes in the Third Person. Refrain from using We, Us, Me, You, I
5. Do not include personal opinions of the Secretary

SUGGESTED FORM FOR RECORDING OF MINUTES:

The regular meeting of \_\_\_\_\_ Alumni Chapter of Mu Phi Epsilon was held at (hour), (month, day, year), at the home of \_\_\_\_\_. President \_\_\_\_\_ called the meeting to order with the Opening Ceremony. Twenty-two members were present. The minutes of the previous meeting were read and approved as read (or approved as corrected).

The report of the Treasurer showed receipts of \$\_\_\_\_\_, disbursements of \$\_\_\_\_\_, leaving a balance of \$\_\_\_\_\_. A copy of the Treasurer's report is attached to these minutes. *(There may be times when the Secretary should include detailed information of receipts from certain projects and disbursements for bills.)*

Reports of the Committees on \_\_\_\_\_ and \_\_\_\_\_ were presented and accepted (or suggested action rejected). The business of \_\_\_\_\_ was discussed and the President appointed a Committee with \_\_\_\_\_ as Chairman to study the matter and report at the next meeting. Also serving on the Committee are \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.

The following program was presented. (List compositions and performers)

Hostesses for the social hour were \_\_\_\_\_.

The meeting adjourned at (hour) with the Closing Ceremony and the singing of *Our Triangle*.

\_\_\_\_\_  
Secretary Signature

Date Approved: \_\_\_\_\_

\_\_\_\_\_  
President Signature

OTHER DUTIES

**Record of Attendance**

Should be taken at each meeting by:

1. Calling names with response or
2. Signing roll sheet or
3. Other method

*Permanent name tags may be used, and collected at the end of each meeting*

Any initiated member of Mu Phi Epsilon who leaves a Collegiate Chapter (**i.e. graduates or does not return to school as an undergraduate**) and is in **Good Standing** is eligible to affiliate with an Alumni Chapter.

**Executive Committee:**

Secretary serves as Secretary of the Executive Board

1. Records minutes – NOT to be read verbatim at Chapter meetings
2. Reports to chapter that the Executive committee met (when, where, etc.) and conducted routine business
3. Reports any recommendations of the Executive Committee to the Chapter

**Visit of District Director**

1. Have Secretary's notebook on hand at the time of the schedule interview
2. Consider any suggestions given by the District Director

**Successor:**

Give to successor: Recording Secretary Officer Manual

- ✓ Secretary's book of minutes
- ✓ All other materials of office

Explain **fully** the duties and procedures of the office to the incoming officer

# Treasurer

## PROPERTIES OF OFFICE

### **For Chapter Records:**

- ✓ Manual of office
- ✓ Treasurer's book with:
  - Receipts/Disbursements pages
  - Individual Membership sheets
  - Treasurer may use a widely accepted computer accounting program, such as Quicken, for keeping chapter financial records. In this case, paper back-up records and reports that members and District Directors may examine still are advisable. New and experimental software products should not be used. The chapter books should be kept in such a way that, in the event of the Treasurer's incapacitation, most members could understand the financial records.
- ✓ Checkbook and deposit slips
- ✓ Savings account book with deposit and withdrawal slips
- ✓ Receipt pad

Fiscal Year for all alumni chapters is July 1 to June 30.

FORMS TO ACCOMPANY PAYMENTS TO INTERNATIONAL EXECUTIVE OFFICE (IEO)

Retain a copy in Chapter files of ALL forms submitted!!!

- |                          |  |
|--------------------------|--|
| <b>Dues Invoice</b>      | For dues payment of all continuing members. Use the website to pay dues. If paying by check, print the invoice and include with payment. If paying by credit card, you may want to print the invoice for record keeping purposes. Dues should be received by IEO no later than October 1 every year. If mailed after Oct 1 a late fee of \$25 should be included in the total. |
| <b>Late Dues Form</b>    | To accompany later mailings of dues for individual chapter members paying dues late OR for new members who affiliate with your chapter after October 1. There is no late fee applied here if chapter dues were paid by Oct 1.  |
| <b>New Alumni Member</b> | Submitted with on-line form to the IEO with a credit card payment or printed and mailed with a check. Candidate should pay fee with personal check to chapter  |

YOUR CHAPTER AND THE INTERNAL REVENUE SERVICE  
(IRS)

Currently, the IRS nonprofit designation of the Fraternity and that of individual chapters are not the same. Individual chapters are designated as 501(c)(7) nonprofit organizations. Mu Phi Epsilon International Professional Music Fraternity is a 501(c)(3) non-profit. Contributions to the Fraternity through IEO are tax-deductible. Contributions directly to individual chapters are not tax-deductible.

You may inform your donors that their financial gifts to the fraternity **may** be eligible for a tax deduction; donor will need to consult with their financial advisor for further information. Mu Phi cannot guarantee that the donation will meet the IRS criteria.

Each chapter of Mu Phi Epsilon has been assigned an Employer Identification Number (EIN) by the Internal Revenue Service. (This is a Federal requirement; it does not matter that you don't have any employees!)

The Internal Revenue Code considers the chapters of Mu Phi Epsilon as constituent yet still autonomous entities with identities separate from the International Fraternity. No chapter may use the fraternity's EIN; each chapter has its own.

Your chapter's EIN must be used for all monetary transactions of the chapter. Banks and investment advisors need it. If you do not know your chapter's EIN, contact IEO. It is the IEO who requests the EIN from the IRS for new chapters.

Even non-profit organizations must file a tax return. As of August, 2008 the IEO files an electronic Form 990-N return for each chapter with the IRS. **Individual chapters should not file this form.**

If your chapter's gross receipts for the fiscal year are more than \$25,000 please contact the IEO. Your chapter will have to file a non-profit tax return Form 990 and possibly hire an accountant, preferably a CPA, to prepare the return.

If you receive any communication from the Internal Revenue Service, contact the IEO before you take any action. You may be asked to mail the communication to the IEO.

Being a non-profit does not automatically bring exemption from state sales taxes. That is a matter of state law and will vary from state to state. Currently, most states who grant sales tax exemption will only grant this to a 501(c)(3) organization. Mu Phi Epsilon chapters are designated 501(c)(7).

## C O N T R I B U T I O N S T O T H E M U P H I E P S I L O N F O U N D A T I O N

You may use one of the MΦE Foundation's remittance envelopes, or you may use the form available at <http://www.mpefoundation.org/contributions.html> on the MΦE Foundation's website. Be sure to include chapter name and the type of contribution [chapter, individual, Golden Benefactor, Sterling Benefactor, Onyx Circle, etc.].

Send check directly to the Treasurer of the MΦE Foundation (not to IEO); the address is available in the directory section of *The Triangle* or on the MΦE Foundation's website: [www.mpefoundation.org](http://www.mpefoundation.org).

## R E V E N U E ( M O N I E S R E C E I V E D )

**Receipts**

- ✓ Always give a receipt for money received, including checks
  - Purchase a receipt pad at any local office supply store
  - Make each receipt in duplicate, retaining a copy for chapter records

**Annual International Dues**

Send dues to IEO, by October 1.

- ✓ Collect dues before due date
- ✓ Always give receipts
- ✓ Make entries on the chapter Membership Sheets of:
  - Amount due
  - Amount received

**Membership Sheets**

- ✓ Should be kept in alphabetical order, one sheet per member, in Treasurer's book (or could be maintained on a computer database)
- ✓ Keep the record current: This is a permanent record!
  - If records are maintained in a database, print the database once a year in order to have a hard copy back-up
- ✓ If a member has a Life Subscription to *The Triangle*, notate this on the member's record in the Membership Sheets (or database).
- ✓ For members no longer affiliated with the chapter, keep sheets in alphabetical order in a No Longer Affiliated section in the back of the Treasurer's book or in a file (or notate as no longer affiliated in database)
  - List reason (deceased, dropped out, moved away—with new address—or transferred to another chapter) for change in status whenever possible. Although unaffiliated, continue to notify IEO of any known address, phone and especially email changes.



### ***The Triangle of Mu Phi Epsilon***

- ✓ Effective September 1, 1997, a subscription to the quarterly journal *The Triangle* became a benefit of membership included in a member's International dues.
  - Those having a Life Subscription to *The Triangle* will receive a reduction in dues, as noted in the fraternity Bylaws or Standing Rules
- ✓ Patrons of a chapter are encouraged (but not required) to subscribe to *The Triangle* or chapters may give their Patrons gift subscriptions. An annual subscription to *The Triangle* is \$20 (as of 2008).

### **Founders Fund (Founders Day Pennies)**

Donations of one penny per year the Fraternity has been in existence are requested from each member. For example: 106 years would be \$1.06. These contributions help pay for the expenses and the awards for the Musicological Research Contest and the Original Composition Contest. (These awards are NOT endowed, so please encourage your members to give their Founders Day Pennies! They support these programs!)

- ✓ This is a traditional voluntary contribution by each member of one penny for each year since the founding of Mu Phi Epsilon in 1903.
- ✓ It is collected and sent to IEO along with dues and other payments.

## DISBURSEMENTS (FUNDS PAID OUT)

### **Dues Payment**

1. Update membership roster
  - ✓ Roster is received from IEO in **August**
  - ✓ Return roster to IEO by **September 1**
  - ✓ Update membership roster
  - ✓ Indicate members no longer affiliated and reason for change
  - ✓ Correct errors and indicate changes in names and/or address
  - ✓ Add names of newly affiliated members, as instructed on your chapter roster in the chapter database
  - ✓ Please, do NOT use roster to pay dues. Wait for invoice to be generated.

### Dues Invoice

- ✓ Invoice (based on returned roster) will be issued by September 1, or as soon as roster is received at IEO
- ✓ Send annual alumni dues, Founders Day pennies, Convention Fund and insurance assessment as indicated on invoice
- ✓ Follow directions on website and send to IEO by **Oct 1**
- ✓ Check and double-check all figures
- ✓ Send original to IEO; keep copy in files

**Late Dues Form:**

Use for monies received any time after the October 1 deadline.

- ✓ Late dues
- ✓ Dues for new mid-year affiliations
- ✓ Extra mid-year contributions to Convention Fund or General Fund
- ✓ Follow directions on form and send all late monies to IEO upon receipt.
  - Do not hold late dues in chapter account more than five (5) days
- ✓ Check and double-check all figures
- ✓ Send original to IEO; keep copy in files

**Ordering Supplies**

You can order chapter supplies through the database

- ✓ Follow directions on form and send to IEO when supplies are needed

**Other Disbursements:**

Local expenses, such as:

- ✓ Printing of programs, chapter yearbook and/or newsletter
- ✓ Local purchases of postage, stationery or chapter equipment or supplies
- ✓ Expenses for Chapter programs: e.g. speakers' honorariums, gifts to honorees
- ✓ Expenses for District Director's visit
  - Housing, meals, transportation within your city
  - Divide expenses with local collegiate chapter if both are visited on the same trip
- ✓ Always make payments by check from chapter accounts!!!

## BANKING PROCEDURES

**Chapter Financial Account(s):**

Comparison-shop at banks for most efficient and convenient handling of monies

- ✓ Checking account in commercial bank, which should not charge fees.
  - Provide bank with fraternity/chapter EIN
- ✓ Savings account(s) in commercial bank or another savings institution.
  - Usually for scholarship funds or other occasionally used monies, in order to earn interest
- ✓ Consider CDs and other higher-interest vehicles if chapter has a large scholarship fund separate from annual operating monies
  - Evaluate your chapter's risk tolerance in choosing investment vehicles
  - Finances should be discussed with chapter members before major investment decisions are made
- ✓ File new names on bank authorization signature cards with bank immediately after installation of new chapter officers.

**Checking Accounts:****Checks**

- ✓ Amount in numerals must agree with amount in words
- ✓ Signature(s) must be the same as on the authorization card filed with bank
- ✓ If authorization card carries name of Mu Phi Epsilon and/or Chapter Name, add this name above signature
- ✓ NEVER give anyone a signed, blank check
- ✓ ALWAYS fill in check stub or register at same time check is written
- ✓ All disbursements should be entered on Disbursement page in Treasurer's book.

**Deposits**

- ✓ Keep a supply of deposit slips with Treasurer's book and/or checkbook
- ✓ Complete deposit slips in duplicate
  - On file copy for cash deposits, indicate names and amounts
- ✓ All receipts should be entered on Receipts page in Treasurer's book
- ✓ Deposit all Checks and Cash Promptly!!

## T R E A S U R E R ' S   R E C O R D   B O O K

**Receipts and Disbursements:**

- ✓ Enter month, day and year in first column
  - Never omit the year
- ✓ Be certain every entry under Amount Received or Amount of Check appears in one or more additional columns which equal amount received or amount of check
- ✓ Always enter number of check
- ✓ Make payments by check unless impossible to do so
  - If it is necessary to give cash, get a receipt from the recipient
- ✓ Total all receipts and disbursements at the end of each month
  - Subtract disbursements for the month from the total receipts to date
  - Indicate balance
    - This balance is reported at chapter meeting
- ✓ Reconcile bank statement as soon as it is received
- ✓ Balance books with the bank statement
- ✓ Enter balance of past month at beginning of entries for new month

**If your books do not balance, work on them until they do:**

- ✓ Start with balance as shown on bank statement
- ✓ Add deposits entered in book but not credited by bank
  - Check to see if these deposits were too late to appear on current statement or whether there was a bank error
- ✓ Subtract outstanding checks
  - Checks you have issued but which have not yet been negotiated

- ✓ If bank pays interest on checking account, add amount shown on statement. If bank charges are included on the statement, subtract this amount

**Membership Sheets:**

Set up an account sheet for each new affiliate when dues are received

Member account sheets can be done on a computer database

- ✓ If you use a database, use a common program in wide-spread use and be prepared to train your successor
- ✓ Keep back-up files on up-to-date storage media

Use a separate sheet for each member, filing alphabetically by surname. Include on Membership Sheets or computer records:

- ✓ Member's full name (including name of initiation and current name)
- ✓ Address
- ✓ Date and Chapter of Initiation
- ✓ If applicable, notation of Life Subscription to The Triangle

For members no longer affiliated with the chapter, keep sheets in alphabetical order in a separate section in the back of the Treasurer's book. Do not discard.

- ✓ Give reason for change in status (transferred to different chapter, moved, deceased, etc. If member moves, be sure to notify IEO and Alumni Advisor of new address).
- ✓ If a database is used, include notation No longer affiliated and reason in the database record. Do not delete.

Every item due and every item paid must be listed on an individual's Membership Sheet

- ✓ Left side of sheet: Debit (month, day, year, item, amount due)
- ✓ Right side of sheet: Credit (month, day, year, item, amount paid)
- ✓ When debit and credit columns balance, member is in Good Standing.

**Example:**

Electa (Goode) Member  
 1 Harmony Lane  
 Talent, OR 97540  
 DOI: 1 April 2003  
 COI: Omega Omega

Debit			Credit		
Date	Item	Amount Due	Date	Item	Amount
8/1/09	Int'l. Dues	\$65.	9/3/09	Int'l Dues	\$65.
8/1/09	Chapter Dues	\$30.	9/3/09	Chapter Dues	\$30.
8/1/09	Founders Fund	\$1.06		Non paid	

## OTHER DUTIES

### **Audit**

- ✓ An annual or frequent audit of the Treasurer's books should be provided for in the chapter bylaws.
- ✓ An audit may be made by the Finance Committee, or in such manner as determined by the chapter bylaws.
- ✓ Record of audit should appear in the Treasurer's books.
  - Date and signature of auditor or Finance Committee members.
- ✓ Retain bank statements, canceled checks, receipt books for seven years
  - For chapter records
  - For legal protection

### **Chapter Budget**

- ✓ Work with Finance or Budget Committee in preparing annual chapter budget
- ✓ Report on matters pertaining to budget, or adjustments of budget, to Finance Committee

### **Chapter Meetings**

- ✓ Be prepared, at every business meeting, to give a report of:
  - Receipts and disbursements for the month
  - Balance on hand
- ✓ If you cannot be present for a meeting, be certain that the Chapter President has a copy of your monthly report to present to the membership.

### **Member of Executive Committee**

Inform the committee of:

- ✓ Due dates
- ✓ Accounts payable and receivable
- ✓ Monthly balance

### **Visit of District Director**

Cooperate with Chapter President with planning for triennial visit

- ✓ Be prepared to take care of District Director's local expenses
  - Meals, housing, local transportation
- ✓ Encourage individual members to volunteer to provide some of the local arrangements

Bring to your scheduled interview

- ✓ Manual of office
- ✓ Treasurer's book (confirm balance with checkbook)
- ✓ Bank account book(s), i.e., checkbook, savings books, etc.
- ✓ Last bank statement

## Planning for Succession

Give to your successor:

- ✓ Treasurer's officer manual
- ✓ Treasurer's book
  - Database and computer files on up-to-date digital storage media
    - Printed hard-copy back-up
- ✓ Bank account books
  - Access codes for online banking, if applicable
- ✓ Bank statements
- ✓ All other materials of office
  - Files, remittance forms, deposit slips, etc.

Have all accounts up-to-date and balanced!

Have all Membership Sheets (or membership database) accurate and up to date

Be sure that changes of signatures have been filed with bank(s) for all accounts

Fully explain the duties and procedures of the office

- ✓ If possible, work together before and after the change occurs

### **The Four Commandments of Successful Treasurers:**

1. Keep treasurer's book up to date
2. Keep membership sheets (or Database) up to date
3. Record all receipts and disbursements promptly and completely
4. Always give receipts for any monies received

# Historian

## DUTIES OF OFFICE

### Getting the Whole Picture

1. The Historian is the link between Mu Phi Epsilon present and past and the Community.
  - a. This office bears the responsibility of creating a positive image of the local Alumni Chapter and of Mu Phi Epsilon in general as you deal with the materials that you publish for:
    - i. Chapter members
    - ii. The unaffiliated members in the area who may see some of the copy
    - iii. The general community
2. The Historian prepares publicity for the Chapter:
  - a. Specific assignments may be delegated to other committees
3. The Historian needs to be thoroughly familiar with the publications of Mu Phi Epsilon
  - a. International Bylaws (available on website)
  - b. Guide to Membership (available on website)
  - c. *The Triangle of Mu Phi Epsilon* (available on website)
  - d. Ritual Book (order from IEO)

Consult IEO if any of the above items are missing from the chapter files

### Chapter Publicity

1. Write publicity for local newspapers regarding Chapter events and members:
  - a. use correct terminology:  
Mu Phi Epsilon, International Professional Music Fraternity
  - b. use correct names, titles, etc.
  - c. have all copy approved by the Chapter President prior to its release
2. Send copy of newspaper items, Chapter newsletter and any other Chapter publicity to:
  - a. the Editor of *The Triangle*
  - b. follow the same guidelines as for local newspaper copy
  - c. have all copy approved by the President prior to its release

### Chapter History

1. A scrapbook is one way to maintain the permanent history of your chapter. If you decided to keep one it should include:
  - a. copies of Chapter programs
  - b. articles and pictures concerning activities of the Chapter and Chapter members
  - c. pictures taken at Chapter events

2. Chapter history may also be preserved electronically using a variety of formats; DVD, CD or a combination of formats. Documents of the items mentioned in No. 1 may be scanned and saved in this space saving manner.

### **Chapter Yearbook**

1. Usually assembled by the President and/or the Yearbook committee
  - a. Historian may be asked to assist
2. Follow guidelines on the *Yearbook Rating Sheet* permanent form
3. Remember to send copies to all members of the IEB and your District Director, in addition to giving copies to all Chapter Members and Patrons

### **Chapter Newsletter**

1. Usually assembled by the President, Corresponding Secretary and/or a Newsletter Committee
  - a. Historian may be asked to assist
2. Follow guidelines on the Newsletter Rating Sheet permanent form
3. Remember to send copies to the IEB and your District Director, in addition to giving/sending copies to all Chapter Members and Patrons.
4. A copy of the latest newsletter should be placed on the chapter website

### **Visit of District Director**

1. Bring to scheduled interview
  - a. Your manual of office
  - b. Chapter Scrapbook or Historical Records of current Triennium
  - c. Current Yearbook
  - d. Current Newsletters
  - e. Publicity
2. Consider all suggestions received from the District Director

### **Successor**

1. Give to successor
  - a. Your pages of Office from the Alumni Chapter Manual
  - b. Chapter Scrapbook or Current Historical Record
  - c. All other materials of office
2. Provide successor with
  - a. Addresses of local newspapers
  - b. Names of editors or columnists of periodicals where you sent copy
3. Explain fully the duties of the office
  - a. if possible, work together before and after the exchange occurs



# Steward

## DUTIES OF OFFICE

In the Alumni Chapter the Steward is a vital member of the Alumni Executive Committee and does take part in the Rituals.

The Steward should arrive at all formal meetings early in order to receive the password and grip from the members, formally admitting each to the meeting. When called upon, the Steward informs the President that “all present are entitled to remain” in the ritual form for the business meeting or the special event that is taking place for members only.

In smaller Chapters, the office of Steward can be combined with other offices, as needed. For example, the Steward may serve the function of procuring the location and hostesses for each meeting.

# Chorister

## DUTIES OF OFFICE

The Chorister may assist the program chairman by planning the music for chapter programs or may be assigned this function to implement alone.

Music for ceremonies, when needed, is arranged by the Chorister, unless this responsibility has been delegated to a special Chairman. The Chorister should make sure that someone is prepared to play ***Our Triangle*** or other Fraternity songs contained in the Mu Phi Epsilon Songbook as part of the meeting. The Chorister promotes ensemble singing in the Chapter.

The Chorister publicizes various fraternity and Foundation Music Awards offered to the members of Mu Phi Epsilon – such as the Original Composition and Musicological Research Contest, Grants-in-Aid, Scholarships, and the International Artist Competition.

The office of Chorister is more flexible than some of the other offices within the Chapter and can be as small or as large as the Chapter decides to make it.

## Standing Committees or Chairmen

**The Committees and/or Chairmen will vary with each Chapter, in accordance with each Chapter's bylaws.**

Committees, and Chairmen of these Committees, may be appointed by the Alumni President as it is deemed necessary for the work of the Chapter. These Committees include:

### BYLAWS & STANDING RULES

1. This committee would do its work in the first year of the Triennium following the International Convention.
2. Following the template provided by the 5<sup>th</sup> Vice President each chapter will update its bylaws as needed to conform to any changes made at the convention.
3. The bylaws revision must be sent via email to the 5<sup>th</sup> Vice President for approval by March 15 of the year following a convention. To be eligible for Alumni Chapter Awards the bylaws must have been approved by the 5<sup>th</sup> Vice President.

### COLLEGIATE CHAPTER ADVISOR

1. This person should be chosen carefully and should possess the following traits insofar as possible:
  - a. Knowledge of the school
  - b. Availability for meeting with the Collegiate Chapter
  - c. Knowledge of Mu Phi Epsilon
  - d. Patience in dealing with college students
  - e. Be reliable and responsible
2. It is possible there may be more than one nearby collegiate chapter support. The same person can serve as chapter advisor to all collegiate chapters, or you may select different members for each chapter.

### MEMBERSHIP

1. Works with the Treasurer to keep an up-to-date list of members for the Chapter
2. Works with the Collegiate Advisor, invites Collegiates to affiliate with the Alumni Chapter upon graduation or cessation of studies
3. Maintains a file of unaffiliated members and strives to bring these members into the chapter
4. Encourages members who move away to affiliate with another Alumni Chapter and sends a brief letter of introduction to the appropriate chapter

MU PHI EPSILON FOUNDATION

1. Works as a liaison between the Chapter and the Mu Phi Epsilon Foundation
2. Helps to promote knowledge of the Foundation within the Chapter
3. Organizes fund-raising activities to help raise the Chapter's yearly donation to the Foundation
4. Encourages Chapter as well as individual members to become Foundation Golden Benefactors.

NEWSLETTER

1. Is responsible for the set up and publishing of the monthly Chapter Newsletter
2. May be responsible for reminders of Chapter events to members and patrons

NOMINATING

1. Committee or Chairman is chosen according to chapter bylaws
2. Prepares a slate of officers to be elected for the following year
3. Reports no later than the February business meeting  
*Note: Nominations from the floor must also be allowed*
4. Election is held as provided for in Chapter bylaws
5. The new Officer List must be submitted to IEO using the template provided on the website immediately following the election
6. Installation is held at the last meeting of the year
7. All materials of office must be passed on to new officers and duties of offices explained
  - a. The outgoing President may call a joint meeting of old and new officers to expedite the transfer of materials around the time of the final meeting of the year

PATRONS

1. Endeavors to find prospective Patrons for the Chapter
2. Presents names of prospective Patrons to Chapter for approval
3. Keeps Patrons informed of Chapter activities
4. Encourages Patron attendance and participation in Chapter events

PROGRAMS

1. This committee may be headed by the Vice President
2. Plans Founder's Day Commemoration
3. Works with the Executive Committee to decide on a Theme for the Year

SERV (SERVICE, EDUCATION, RESOURCE, VOLUNTEER)

1. Keeps a record of all SERV service done by the Chapter Membership
2. Encourages Chapter membership to participate in SERV by giving short presentations at the chapter meetings or writing articles for the chapter newsletter
3. Organizes SERV activities and project for Chapter participation
4. Completes the SERV report:  
Prepares a copy for the Chapter President who sends it to the Alumni Advisor (3<sup>rd</sup> Vice President), along with the President's Annual Report, by June 15<sup>th</sup>

MEDIA COORDINATOR

1. Builds and/or maintains Chapter website and/or Facebook page
2. Website should contain meeting information and Chapter information
3. Encourages members to utilize the Fraternity and Chapter websites as sources of information

YEARBOOK

1. Works with the Chapter President, Treasurer, Program and Membership Chairmen, to prepare the Chapter Yearbook – following the requirements and suggestions in the Yearbook rating Sheet in this manual
2. The yearbook should be available to the membership no later than September 15<sup>th</sup>
3. Copies should be distributed to all chapter members, all Chapter Presidents in the Province (including collegiate), the District Director and the IEB

# New Alumni Members

## CANDIDATE QUALIFICATIONS

- ✓ For persons who show evidence of musical talent and are actively engaged in some area of music;
- ✓ Who are not enrolled as an undergraduate in school;
- ✓ Who meet the requirements specified for collegiate eligibility **OR** have demonstrated outstanding musical abilities in a professional capacity for 2 or more years;
- ✓ Who are seeking active membership in an Alumni Chapter; and
- ✓ Who has never been a member or honorary member of another professional music fraternity (Delta Omicron, Phi Beta, Sigma Alpha Iota or Phi Mu Alpha Sinfonia)

## STEPS FOR CANDIDATE APPROVAL:

1. Obtain from the candidate(s):
  - ✓ an Education and Professional Profile (Bio or Resume), indicating area of specialization, educational background, professional position, performances, honors and community service contributions.
  - ✓ letter of recommendation for each candidate written by a chapter member.
2. Chapter votes to offer membership to candidate. Vote must be two-thirds majority of alumni members.
  - ✓ When the chapter has voted to accept the new initiate, download from the Resource page for Alumni on the website the Guide to Membership and give it to the prospective initiate to study and review.
  - ✓ Download from the website the quiz for the Guide to Membership and ask the prospective initiate to complete. Correct the quiz using the answer key, also found on the website.
  - ✓ Select and complete the New Alumni Member Initiation Guide and Reporting from the Resource page for Alumni on the website.
  - ✓ IF your candidate does not meet the general membership requirement above, you may still apply for membership through the Eligibility Advisor.
  - ✓ Upon receipt of the fee and form, IEO will mail the badge(s) to the designated chapter officer. Membership certificate(s) and card(s) will be mailed directly to new member unless otherwise noted to IEO.

*\*Membership fee paid by the prospective candidate includes candidate fee, Initiation Fee, one-year international alumni dues, a one-year subscription to The Triangle (quarterly fraternity publication), official badge, membership certificate and card*

# SERV

## (SERVICE, EDUCATION, RESOURCE & VOLUNTEER)

Service in Mu Phi Epsilon plays an important role in the structure of your chapter. Much of what we stand for is “service through music.” The acronym of SERV can provide important guidelines and examples of what can comprise this service. Each member should keep track of how many hours of total service they accrue over the year to report to the chapter SERV chair or president for their annual report. Each chapter should also keep track of projects that fit within these examples. In general, an activity can count for SERV hours or a chapter SERV project if individuals do not receive payment, if the chapter does not collect any funds for their own use from the activity, and if the activity is not part of a class credit or degree requirement. You are encouraged to involve music in your service wherever possible. However, hours CAN count for SERV when music is not the focus of the service activity.

**S E R V I C E** To your community or school with no personal or chapter remuneration or fulfillment of class credit or degree requirement, such as:

- ♫ Accompanying, church musician or director, musical group participation or performance, music management, ushering, free labor for a civic musical group, fundraising for the international fraternity/ foundation/ another non-profit or philanthropic organization

**E D U C A T I O N** Musical instruction with no personal or chapter remuneration or fulfillment of class credit or degree requirement, such as:

- ♫ Private or group lessons, theory/music history/appreciation classes or sessions, conducting, directing musical theater production, instrument demonstrations (petting zoos)

**R E S O U R C E** Activities where “special populations” specifically benefit, with no personal or chapter remuneration or fulfillment of class credit or degree requirement, such as:

- ♫ Projects serving disadvantaged persons (underserved socioeconomic groups), geriatric, hospitals, nursing homes, special education, inner city children, homeless, assisted living, homebound, abused, minority or handicapped, women’s shelters, LGBTQ+ populations, etc.
- ♫ Volunteer musical group activities such as concerts, sing-a-longs, group involvement activities with rhythm instruments, caroling, music therapy, sharing taped or recorded music for these special populations.

**V O L U N T E E R** Follow these additional guidelines for tallying your service hours and planning your events. Remember that the ‘heart’ of service is when you give of yourself to others but receive no tangible benefit. Tally your hours with integrity, use your best judgement, and SERV! YOU are the key to success!

- ♫ Travel does NOT count, to or from an event.
- ♫ Within reason, hours spent in ‘preparation’, including rehearsals, DO count, if the activity is done as a group. Practicing music individually does NOT count –you accomplish this on your own, for yourself.
  - Another example: Time spent setting up a stage for a community performance right before the final performance, can count. But time spent baking cookies, at home, alone, for said event, does not.

- ♪ If the activity is done as a requirement for a class credit or hours, or as a specific degree requirement, it does NOT count. Any class credit given, any events that are required as part of a class, participation in a school ensemble, or anything required for YOUR degree plan does NOT count.
- ♪ Any event for which you personally earn money, does NOT count, either as a job, salary, or if the money is used for chapter funds. If the money raised is 100% donated to another philanthropic organization, or another non-profit cause, it DOES count.

## Noteworthy Community Service Project

Since **Service** is one of the main reasons Mu Phi Epsilon exists, it is only logical we should strive to do projects that involve the entire Chapter, working together for the common good. Alumni Chapters of Mu Phi Epsilon are encouraged to enhance the communities where they are located by performing noteworthy musical service that can benefit everyone.

This Noteworthy Project:

- is to be a venture **involving the whole or majority of the chapter**;
- offers music (e.g., performance) or focuses on an aspect of music (e.g., education, group activity) for the **entire community**;
- if money is raised, all profits should go toward the project or philanthropic cause;
- should be notably **different from** activities that target specific populations (such as the elderly in retirement homes).

Though the project should be under the direction of an appointed Chairman for the event, it could be under the direction of the President (or any other member of the Executive Board) depending upon how the duties are divided within the Chapter.

Regardless who chairs the project, it is the job of the **President** to include a description on the proper form as a part of the Annual Report sent in June. **Be sure to fill in all the areas of the form and describe in detail** what the Chapter did for the community. Whenever possible, attach any publicity and/or programs that may have been used for the project.

Based upon descriptions from the Annual Report, the Alumni Advisor (in consultation with the IEB) will award the **Noteworthy Community Service Project Award**, recognizing a chapter that offers an innovative, quality music service to their community.

# Patrons

**Chapters may invite individuals who are interested in music and willing to assist in carrying out the purposes of Mu Phi Epsilon to become Patrons.**

A formal written invitation to prospective Patrons outlining any suggested annual donation levels and any other expectations of the chapter regarding participation clarifies the role we expect them to play in chapter activities. This may be preceded by a verbal invitation to gauge the interest of the prospective Patron. Suggestions for Patron membership should be presented for approval by the Chapter before the written invitation is extended.

## Patrons may be:

- Relatives of Chapter members
- Friends of Chapter members
- Faculty members and/or their spouses
- Chairman of Music Department
- President of the College/University/Conservatory
- Outstanding civic leaders with an interest in promoting music in the community
- Outstanding local musicians and music educators

**Note:** *these may also qualify for Alumni membership*

- Anyone who loves music

## Installation and Status of Patrons

- Patrons are installed using the Patron Installation Ceremony from the Ritual
- Patrons are **not** members of Mu Phi Epsilon and thus they may **not** attend any closed ceremonies. They **may** attend any Chapter business meeting or other function where closed ceremonies are not used.
- Chapters are encouraged to purchase a one-year subscription to *The Triangle* as a way of introducing new patrons to the work of the Fraternity
- The Chapter is encouraged to present the Patron with a Fraternity Patron pin at the time of their installation. Patron pins are available from IEO.

## Mu Phi Epsilon does not require our Patrons to limit their support to only our Fraternity:

However, Delta Omicron, Phi Beta and Sigma Alpha Iota prefer that their Patrons not serve as Patrons of another professional music fraternity, and that their members not serve as Patrons of another professional music fraternity.



# Sterling Patrons

## **Sterling Patrons are:**

- Patrons who serve the Fraternity as a whole and are not affiliated by ritual with Delta Omicron, Sigma Alpha Iota, Phi Beta, or Phi Mu Alpha Sinfonia.
- approved by the International Executive Board and presented a certificate by a member of IEB or a representative at a special induction ceremony.
- may be inducted at an International Convention, a District Conference or any other appropriate occasion
- consummate professionals in their specialized fields of music.
- musicians who have excelled and are well-known in the musical world.
- those who are well known for their support of the musical arts in their community and beyond

## **Induction of Sterling Patrons:**

- a certificate is prepared by INEST and presented to each Sterling Patron in a special ceremony, usually in the geographical area where the recipient is well known.
- The recipient's name then joins the growing list of musicians honored in this special way by Mu Phi Epsilon

## **The Sterling Patrons of Mu Phi Epsilon**

The current listing of our Sterling Patrons can be viewed on our website, [www.muphiepsilon.org](http://www.muphiepsilon.org).

We encourage our alumni members to give suggestions to the IEB for future Sterling Patrons by submitting nominations.

## Alumni Awards & Contests

### INTERNATIONAL CHAPTER OF THE YEAR

- awarded annually by IEB:
  - selection is based on
    - o content and promptness of Chapter President's Report
- Note:** a list of Alumni Chapter Goals is sent to chapters and is available on the website
- o service to Collegiate Chapter(s), school(s), and Community
  - o promptness in complying with Fraternity financial and reporting deadlines
- outstanding Chapter in each Province receives a Certificate as *Province Alumni Chapter Award Winner*
  - international winning chapter receives a Certificate as the *International Alumni Chapter of the Year*

### KATHERINE G. DOEPKE CREATIVE PROGRAMMING AWARD

- awarded annually by IEB to the Alumni Chapter that exhibits the most creative programming at its regular meetings.
- goals of the award:
  - o to encourage program excellence at regular Chapter meetings,
  - o to explore creative ways to present programs using a theme,
  - o to motivate members to gain new and retain present members.
- winning Chapter receive a certificate and a monetary award.
- a complete description of requirements is at the end of this section on awards

### ORAH ASHLEY LAMKE DISTINGUISHED ALUMNI AWARD

- awarded based on long, loyal, and dedicated service to Mu Phi Epsilon.
- designed to recognize the contributions of loyal members who have not been given recognition at the international level
- see page 43 for a complete description of requirements and application

**Note:** members are not eligible for this award if they have served on either the IEB or the Mu Phi Epsilon Foundation Board of Directors.

### ELIZABETH MATHIAS AWARD

- given only in convention years to Alumni members who have reached a high level of professional recognition and achievement.
- recipient is selected by IEB.

#### AWARD OF MERIT

- given occasionally, and only in convention years, to outstanding members of Mu Phi Epsilon who bring honor to the Fraternity in their fields of music.

#### ACME HONOREE

- is awarded to members who are outstanding artists, educators or in their field
- nominations are made by contacting the ACME Chairperson listed in *The Triangle* or on the Mu Phi Epsilon website [www.muphiepsilon.org](http://www.muphiepsilon.org)

#### SERVICE, EDUCATION, RESOURCE, VOLUNTEER, (SERV)

- SERV awards are based upon volunteer service by Chapter members.
- Certificates are given to individual members contributing 300 or more hours per year.
- The Alumni (3<sup>rd</sup> VP) and Collegiate Advisors (2<sup>nd</sup> VP) determine recipients based on the annual SERV report from each Chapter.

#### VIOLET ACHIEVEMENT

**The Violet Award** Is a chapter honor given to a member who has not held a national or international level position with the Fraternity. Each Alumni Chapter has one or more members who give generously of time and talent, always working for the benefit of the chapter, but for various reasons may not ever serve on the national level. The Violet Award was designed for them.

Any chapter can bestow the Violet Award on one of its distinguished members. Simply contact the International Executive Office to order a violet pin and compose your own words to honor this special person.

#### ORIGINAL COMPOSITION CONTEST & MUSICOLOGICAL RESEARCH CONTEST

- entrants **must** be members of Mu Phi Epsilon in **good standing** (current dues paid)
- rules, classifications, etc. are sent in the fall mailing and published in *The Triangle*
- are administered by the Music Advisor (4<sup>th</sup> Vice President)
- these two contests rotate biannually:
  - o Composition Contest in odd years
  - o Research Contest on even years.

MARIAN BOWKER DAVIDSON COLLABORATIVE PIANIST  
AWARD

Affiliated members in good standing may apply for this \$1,000 award, given to support a project for a collaborative pianist (piano, organ or other keyboard instrument), the proposed project to develop performance skills, to allow further non-academic study, or to facilitate some special project. The award is not limited by age, financial need, or projects in the United States.

KATHERINE G. DOEPKE  
CREATIVE PROGRAMMING AWARD

The Katherine G. Doepke Creative Programming Award of \$150 is given annually to the Alumni Chapter that exhibits the most creative programming at its regular meetings. The goals of the award are:

- △ To encourage excellence of programs at regular Chapter meetings
- △ To explore creative ways to present programs
- △ To motivate members to gain new members and retain present members

**Criteria**

- △ Must be printed in Yearbook and sent to all IEB members
- △ Must have a theme for the year of programs
- △ Must list at least six-monthly chapter programs
- △ Should use creative formats to exemplify theme for each program
- △ Should include at least four of the following:
  - Multicultural Program
  - American Composers
  - Book Report
  - Music Therapy
  - Multi-Media Program
  - Mu Phi Epsilon Composers
  - Community Outreach

**Requirements**

1. Submit a list of the year's programs (from Yearbook or typed list) stating overall theme, month variation of theme, performers, and titles of presentations
2. Write a paragraph describing how the Chapter met the Award's goals. Include a review of one excellent program.
3. Send a copy of the list and the paragraph to the International 3<sup>rd</sup> Vice President (Alumni Advisor) with the Annual report prepared by the Chapter President
4. Check the box on the Alumni President's Annual Report Form, in the section marked, "Additional Goals", "Doepke Creative Programming Award materials sent with Annual Report".

ORAH ASHLEY LAMKE  
DISTINGUISHED ALUMNI AWARD

The Orah Ashley Lamke Distinguished Alumni Award is given annually based on long, loyal, and dedicated service to the Fraternity.

The award is designed to recognize the contributions of loyal members who have not been given recognition at the international level by means of an international office in the Fraternity or service on the Board of the Mu Phi Epsilon Foundation.

In non-convention years, the selection is made by the International Executive Board. In a convention year, the two host Provinces meet during convention to select a recipient from within these Provinces.

It is suggested that an Alumni Chapter President complete the Orah Ashley Lamke Nomination Form and have at least one other person provide a letter of recommendation to the International Alumni Advisor. It is helpful if the written recommendation is accompanied by a biography. (In Convention years, Chapter Business Delegates should bring these materials to the Province meeting where the recipient is chosen.)

To guide you in recommending a candidate, ask the following:

- ✓ Has active membership in Mu Phi Epsilon been consistently maintained through the years?
- ✓ Does the member exemplify the ideals of Mu Phi Epsilon?
- ✓ Have assignments been carried out on the Chapter level or beyond the Chapter level?
- ✓ Has responsibility and additional work been accepted willingly?
- ✓ Has concern for the welfare of Collegiate members been constant?
- ✓ Has the member made an impact on the life of the community as well as in the Chapter?

**MU PHI EPSILON  
ORAH ASHLEY LAMKE DISTINGUISHED ALUMNI AWARD  
NOMINATION FORM**

Complete the following nomination form and mail by June 15<sup>th</sup> to the Alumni Advisor (3<sup>rd</sup> Vice President).

This award is given annually based on long, loyal, dedicated service to the Fraternity. The selection is made by the International Executive Board in non-convention years and nominations are accepted from all chapters. During a convention year, nominations are made and the winner selected from only the Convention Host Provinces.

Name \_\_\_\_\_ Phone \_\_\_\_\_

Chapter and Date of Initiation \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Write in detail on a separate sheet regarding the items below and include any published accounts:

- Service to Mu Phi Epsilon  
    Offices held and committee work
- Participation in Community Activities  
    Other music organizations offices held, civic symphony or choir, private teaching
- Achievement in Professional Music Activities  
    Include research, education, performance, music therapy, etc.

Why does your chapter feel this member deserves to receive the Orah Ashley Lamke Award? At least one (1) letter of recommendation from a chapter member must be submitted with this form.

\_\_\_\_\_  
Recommending Member Signature

\_\_\_\_\_  
Chapter President Signature

Alumni Chapter \_\_\_\_\_ Date \_\_\_\_\_

# Mu Phi Epsilon Foundation

The Mu Phi Epsilon Foundation was incorporated and is operated exclusively for charitable and educational purposes, for the promotion and advancement of music throughout the world and for the benefit of philanthropic projects consistent with the philosophy of the Mu Phi Epsilon Fraternity. A list of the activities of the Foundation is outlined below. For complete information visit the Foundation website at [www.mpefoundation.org](http://www.mpefoundation.org).

## Continuing Projects

- Mu Phi Epsilon International Competition
- Mu Phi Epsilon Artist Concerts
- Grants and Grant-in-aid
- Scholarships
- Summer Scholarships
- Philanthropies

## Financial Support Comes From

- Members
- Chapters
- Golden, Double Golden and Sterling Benefactor Pledges
- Memorials
- Bequests

Gifts and contribution should be sent to the Treasurer of the Mu Phi Epsilon Foundation

- Name and address of Treasurer are in ***The Triangle*** and on the Foundation website, [www.mpefoundation.org](http://www.mpefoundation.org)

## Mu Phi Epsilon International Competition and Artist Concerts

- competition held in convention years
- application information and requirements are available on the Foundation website, [www.mpefoundation.org](http://www.mpefoundation.org)
- winner(s) sponsored in concerts for the following two (2) years
  - o Mu Phi Epsilon Artist Concerts **must** be sponsored by Mu Phi Epsilon Chapters
  - o receipts from the concert charges
    - Become the property of sponsoring Chapter(s)
    - A percentage or all should be contributed to the Mu Phi Epsilon Foundation
  - o travel expenses of the artists are paid by Mu Phi Epsilon Foundation
  - o housing, meals and local travel expenses of the artists are paid by the sponsoring Chapter(s)
  - o sponsoring Chapter(s) responsible for:
    - selection of suitable concert space
    - tuning of piano or keyboard (if provided)
    - arranging of rehearsal time and accompanist
    - local publicity
    - a local community service project or master class involving the Artist

Inquiries about scheduling a Mu Phi Epsilon International Artist Concerts are handled by the Artist Concert Manager, see a recent ***Triangle*** or visit the Foundation website:

[www.mpefoundation.org](http://www.mpefoundation.org)

# District Director Visit

## CHAPTER REVIEW

The District Director customarily visits Alumni Chapters within the District during the year preceding an International Convention of Mu Phi Epsilon, or at the direction of the International Executive Board.

### **Purpose of Visit**

- To promote Chapter awareness of the scope of the international organization and the international activities
- To maintain contact between the international organization and the individual Chapters
- To observe the work of the Chapter and its officer
- To assist in the proper conduct of ceremonies as set forth in the Ritual
- To evaluate musical standards in the chapter
- To give assistance and encouragement in the accomplishment of the
- To stimulate interest in the support of international projects
- To stimulate musicianship, scholarship, friendship and service through music
- Must be completed by the end of the third year of the Triennium. Schedule the visit to accommodate the schedule for visiting a nearby collegiate chapter

### **Responsibilities of the Chapter**

- Schedule a conference with all Chapter officers
- Provide written schedule to the District Director prior to or upon arrival
- Instruct each officer to bring along records and other materials of office
- Conduct a Chapter business meeting using Opening and Closing Ceremonies
  - o May be a regular or a model meeting
- Present a musical program representative of the Chapter's best talent
  - o may be a joint program with a Collegiate or another Alumni Chapter or a public program in connection with a social event
  - o Patrons may be invited
  - o If Chapter desires to send a Music Delegate to the next International Convention, the candidate must perform for the DD
- Arrange and assume financial obligation for meals, housing and transportation of District Director within your city
  - o may be shared with Alumni and/or Collegiate Chapters in the same vicinity



# District Conference

## District Director Responsibilities

1. Scheduling: Date, time and location agreeable with Chapters
2. Organizing: Utilization of members from all Chapters
3. Conducting: Utilizing Shared Leadership

## Who Attends

- **All Alumni and Collegiate Chapters within a given District**
  - o Can be done with two adjacent Districts
  - o Can also be done with the entire Province

## Why Come

- an opportunity to become acquainted (or better acquainted) with Collegiate and Alumni members within the District or Province
- to receive inspiration through the exchange of ideas
- to give inspiration and encouragement to Collegiate Chapters
- to share music
- to learn more about Mu Phi Epsilon at the District, Province, and international levels
- to share the joy of Mu Phi Epsilon membership

## Date and Place

- determined by the Chapter Business Delegates during the Province meeting at International Convention
- should rotate among the Chapters in the District(s)
- if not determined at convention, the District Conference will be scheduled by the District Director in agreement with the District Chapters at the Presidents' meeting following the convention
- is held during the second year of the Triennium

## Responsibilities of Chapters

- send as many representatives as possible
  - o at the expense of the Chapter and/or members
  - o to participate in the overall programs (discussions, music, Ritual, etc.)
  - o share expenses of the District Conference by means of:
    - Chapter assessment, registration fee, or a mutually agreed upon means
- host Chapters assist in carrying out planning and local arrangements for luncheon, coffee time, facilities, musical program, etc.

## Who Pays

- IEO pays District Director's travel to/from District Conference
- All other expenses of the conference are paid from the District Chapters' collected revenues
  - o Assessment, registration fees etc.

# International Convention

## THE GOVERNING BODY OF THE FRATERNITY

### How Often

- held triennially since convention vote in 1974

### Hosts

- Provinces serve as hosts on a rotational basis – two per convention
  - o All Collegiate and Alumni Chapters in the two host Provinces will be assigned convention responsibilities
- IEB sets the dates and location of the convention

### Alumni Delegates

- Business Delegate
  - o Required of each Chapter
  - o May not serve as accompanist for a music delegate or be a music delegate
  - o Elected by Chapter at a chapter business meeting **no later than January preceding convention**
  - o Alumni Chapter must pay the registration fee and give other financial assistance as they are able
  - o Should be the new Chapter President, or another major officer if President cannot attend
    - Must be a member in good standing
    - Must be an active member of the Chapter during the year following convention
- Alternate Delegate
  - o Must be available to replace delegate if an emergency prevents delegate from attending convention
  - o Alternate delegate then becomes the business delegate and a new alternate should be elected (if there is time to do this before the convention begins)
- Music Delegate
  - o Optional for each Chapter
  - o Must be heard by the District Director in a live performance during Chapter visit
  - o Final choice of performers and selections is made by the International 4<sup>th</sup> Vice President, may NOT be the Business Delegate
  - o Sent at the expense of the Chapter and/or Delegate
  - o Must send application form and a good quality recording of three pieces ready for performance to the Int'l 4<sup>th</sup> Vice President (Music Advisor)

### Business

- Order of business shall be determined by International Executive Board
- Any directive, act, or resolution not inconsistent with International Bylaws may be proposed, debated and voted upon.

## Request for Alumni Chapter Inactive Status

It is the hope of all members of the International Executive Board that this form will never have to be used by any of the Alumni Chapters that are in existence.

However, the reality is that at some point in time, it may be necessary for an Alumni Chapter to request **Inactive Status** for a short time, as a way of gaining strength to become active once again. Permission may be granted for the chapter to become temporarily inactive. However, it will NOT be closed.

Should the situation arise, and once all else has been done – including working with the **District Director**, the **Alumni Advisor**, the **IEO**, and the **Extension Officer** (International 1<sup>st</sup> Vice President) – then **it is of the utmost importance** that the accompanying Request for Inactive Status form be filled out and sent to:

1. The Alumni Advisor (International 3<sup>rd</sup> Vice President)
2. The District Director
3. The International President

**Please be sure to give complete details** as the form instructs and to use as much space as necessary.

When the form is received by these three officers, procedures can be set in motion to grant the request of the Chapter by the IEB.

Please bear in mind that this form is only being inserted into the Alumni Officer Manual in the unlikely event that such an occasion will arise.

## **MU PHI EPSILON**

### **REQUEST FOR ALUMNI CHAPTER INACTIVE STATUS**

Please note: All chapter members will be expected to continue to maintain their affiliated status with the fraternity, by paying alumni dues annually as Allied members.

Chapter Name \_\_\_\_\_ Number of Members \_\_\_\_\_

Person making this request \_\_\_\_\_

Position with the chapter \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_ Email Address \_\_\_\_\_

Please explain why the Chapter is requesting inactive status. Give specific details using as much space as necessary. Please consider what arrangements need to be made for Ritual supplies, scrapbooks, any finances owned by the chapter, possible merging with a neighboring chapter, and recommendations for members to transfer to other chapters or become individual Allied Members.

## ALUMNI CHAPTER ANNUAL PRESIDENT'S REPORT CHECK LIST

Serves as a reminder when planning and executing programs for the year and is a valuable guide when preparing the Annual Report which is due June 15<sup>th</sup>.

### I. Required for the Chapter to Be Eligible for Any Awards

- Annual Report** from the PRESIDENT MUST BE POSTMARKED no later than June 15, and submitted to each of: International Alumni Advisor (3<sup>rd</sup> VP), International President and District Director
- Bylaws** amended to conform to 2017 International Bylaws Revisions, are approved by the International eligibility Advisor and on file with his office.
- Dues** PAID TO IEO by October 1<sup>st</sup>. New affiliate dues may be paid at any time.
- One copy of **Officer List** submitted to IEO, International President, District Director and Alumni Advisor by June 15<sup>th</sup> (even if officers remain the same). Form is available online at [www.muphiepsilon.org](http://www.muphiepsilon.org)
- Six Chapter Programs** (2 public) scheduled.

### II. Additional Goals – Points awarded for each goal

- |   |       |
|---|-------|
| <input type="checkbox"/> Newsworthy articles/features/items sent to <b>The Triangle</b> Editor  | 15*   |
| <input type="checkbox"/> Doepke Creative Programming Award materials sent with Annual Report  | 25    |
| <input type="checkbox"/> North American composers used on programs  | 5     |
| <input type="checkbox"/> Mu Phi Epsilon Composers used on programs  | 10    |
| <input type="checkbox"/> Multicultural program presented  | 5     |
| <input type="checkbox"/> Music project of service to the community, whole chapter   | 25    |
| ▪ Describe on form located in the back of the manual  |       |
| <input type="checkbox"/> Chapter participated in Service, Education, Resource, Volunteer (SERV)   | 25    |
| ▪ List individual Chapter members participating   |       |
| <input type="checkbox"/> Copy of SERV form sent to Alumni Advisor with Alumni Chapter President Report postmarked by June 15 <sup>th</sup> deadline | 10    |
| <input type="checkbox"/> Newsletters sent to chapter members  | 25    |
| <input type="checkbox"/> Newsletters sent to Int'l President, Triangle Editor, Alumni Advisor, IEO, DD,   | 25*   |
| ▪ District chapter presidents, both alumni and collegiate   |       |
| <input type="checkbox"/> Founder's Day Observance held  | 20    |
| <input type="checkbox"/> Non-financial assistance given to collegiates or community music school  | 10-25 |
| ▪ Describe what was done on a separate sheet  |       |
| <input type="checkbox"/> Chapter yearbook sent to chapter   | 10    |
| <input type="checkbox"/> Chapter yearbook sent to all 8 Int'l Officers and DD   | 10    |
| <input type="checkbox"/> Helped organize a collegiate chapter installed this year   | 25-50 |
| <input type="checkbox"/> Helped reactivate a collegiate chapter this year   | 25-50 |
| ▪ (applies to a previously installed chapter with zero members)   |       |
| <input type="checkbox"/> Helped revitalize a collegiate chapter this year   | 25    |
| ▪ (applies to a previously installed chapter with fewer than 5 members before Alumni Chapter efforts)   |       |
| Other noteworthy projects done by Chapter   | 10-25 |
| ▪ Describe what was done on a separate sheet  |       |
| <input type="checkbox"/> Sponsored a Mu Phi Epsilon Int'l Artist Concert  | 30    |
| <input type="checkbox"/> Co-sponsored a Mu Phi Epsilon Int'l Artist Concert   | 15    |
| <input type="checkbox"/> Chapter engaged in a special "Reach Out" member-recruitment effort   | 25-50 |
| ▪ Describe what was done on a separate sheet  |       |

- |                          |   |    |
|--------------------------|---|----|
| <input type="checkbox"/> | Points awarded for growth in membership numbers, verified by IEO records per member | 20 |
| <input type="checkbox"/> | Points awarded for newly initiated alumni members, verified by IEO per person       | 20 |
| <input type="checkbox"/> | Points awarded per person for recent collegiates becoming members                   | 20 |

### III. MONETARY CONTRIBUTIONS

- |                          |   |    |
|--------------------------|---|----|
| <input type="checkbox"/> | Donated to the Fraternity*  | 50 |
| <input type="checkbox"/> | Donated to Mu Phi Epsilon Foundation*                                       | 15 |
| <input type="checkbox"/> | Held a fund-raising event and donated the proceeds to the Fraternity        | 50 |
|                          | ▪ Describe your fund-raising project on a separate sheet                    |    |
| <input type="checkbox"/> | Donations were made to local musical organizations                          | 10 |
| <input type="checkbox"/> | Scholarships/Prizes were given to collegiate members                        | 25 |
| <input type="checkbox"/> | Scholarships/Prizes were given to non-member collegians in applied music    | 25 |
| <input type="checkbox"/> | Financial assistance was given to Alumni Chapter Members                    | 25 |
| <input type="checkbox"/> | Chapter made an additional contribution toward costs of the 2020 convention | 25 |
|                          | ▪ Contribution may be in the form of cash or "gift in lieu of cash"         |    |

\*Points to be awarded by Alumni Advisor upon verification from appropriate chairman/officer

**Note:** *in order for a chapter to receive recognition as a province winner, the chapter must earn a minimum of 100 points from the above list*



**ANNUAL REPORT OF ALUMNI CHAPTER PRESIDENT**  
*Must be postmarked by June 15<sup>th</sup>*

<b>CHAPTER NAME:</b>	<b>DATE:</b>
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Send one copy of report to each: **Alumni Advisor** – Marcus Wyche, 2729 Nicholson St #103, Hyattsville MD 20782  
 Email: [alumniadvisor@muphiepsilon.org](mailto:alumniadvisor@muphiepsilon.org)  
**International President** – Rosemary Ames, 21220 St Petersburg Drive, Venice FL 34293  
 Email: [president@muphiepsilon.org](mailto:president@muphiepsilon.org)

**CHAPTER PRESIDENT:** \_\_\_\_\_ **PROV/DISTRICT** \_\_\_\_\_  
**President’s Address:**

Street No. \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ 9-number Zip Code \_\_\_\_\_

Email Address \_\_\_\_\_ Phone(s) \_\_\_\_\_

Chapters Website Address \_\_\_\_\_

Chapters Facebook Link \_\_\_\_\_

NOTE: This report is divided into three sections:

**(1) REQUIREMENTS, (2) ADDITIONAL GOALS, (3) MONETARY CONTRIBUTIONS**

*In order to become eligible for the Alumni Chapter Province and Service Awards, chapters must complete all items outlined in Section I. **REQUIREMENTS**, of this document. Award winners are determined using a point system (eligible points for each item can be seen on the Alumni Chapter Annual President’s Report Check List in Manual).*

**Place a checkmark in box if accomplished:**

**I. REQUIREMENTS**

- The Annual Report was postmarked by the deadline
- Chapter bylaws amended to conform with the current International Bylaw Revisions and approved by International Eligibility advisor
- International Dues and Convention Contribution were mailed and postmarked by deadline
- Officer List was sent to IEO, President, Alumni Advisor and District Director by June 15 (*even if no changes*)
- Six Chapter programs, including two public, were scheduled

**II. ADDITIONAL GOALS**

- Newsworthy articles, features and/or items were sent to *The Triangle* Editor
- Chapter Newsletter published and sent to chapter members
- Chapter Newsletter sent to the *Triangle* Editor, Int’l President, IEO, Alumni Advisor, District Director and local Chapter Presidents, both Alumni and Collegiate
- Chapter Yearbook sent (or given) to all Chapter members
- Chapter Yearbook was sent to District Director, all 8 International Officers, and Foundation Chairman

- A special Founder's Day Observance was held. Describe here.

- A theme for the year to guide programming was selected and implemented. Describe below  
**Attach** Doepke Creative Programming Award materials here and describe.

- Works of North American Composers were presented on Chapter programs
- Works of Mu Phi Epsilon Composers were presented on Chapter programs
- Describe how music from a variety of cultures and periods was presented at chapter meetings and programs.

- Chapter participated **as a group** in a noteworthy music project of Service to the Community. **FOR AWARD ELIGIBILITY: Describe in detail**, including where and when the project took place.

- How many total hours was contributed to the project? \_\_\_\_\_
- How many chapter members were involved? \_\_\_\_\_
- Add information here for any **additional chapter projects worthy of note.**



How many CHAPTER hours total was contributed to SERV activities throughout the year? \_\_\_\_\_

List individual names who report more than 300+ volunteer hours. List their name first, and hours second.

List individual names of **Patrons** who report more than 300+ volunteer hours. List their name first, and hours second.

Describe chapter's efforts to recruit, retain and attract new and non-affiliated members.

How did your chapter offer non-financial assistance to Collegiate Chapters?

- Chapter helped organize a new Collegiate Chapter installed this year
- Chapter help reactivate a Collegiate Chapter this year (previously installed, with zero members)
- Chapter help revitalize a Collegiate Chapter this year (previously installed, with fewer than five members before Alumni Chapter efforts)
  
- Chapter sponsored a Mu Phi Epsilon International Artist Concert – provide details below
- Chapter co-sponsored a Mu Phi Epsilon Artist Concert – provide details below

**III. MONETARY CONTRIBUTIONS**

- Donated to The Fraternity\* (by May 31<sup>st</sup>) Amount \_\_\_\_\_
- Donated to The Mu Phi Epsilon Foundation \* (by May 31<sup>st</sup>) Amount \_\_\_\_\_
- Held a fundraising event and donated the proceeds to the Fraternity\* Amount \_\_\_\_\_
- Scholarships/Prizes were given to Collegiate Members Amount \_\_\_\_\_
- Scholarships/Prizes were given to non-Mu Phi Collegiates Amount \_\_\_\_\_
- Financial assistance was given to Alumni Chapter Members Amount \_\_\_\_\_
- List any contributions (e.g. cash, gifts, equipment), to either organizations or individuals, and provide details.

**TOTAL MONETARY CONTRIBUTIONS**

**TOTAL \$** \_\_\_\_\_

**ATTACHMENTS:**

Attach any programs or supplementary documents that will further describe your projects and/or events noted above.

## MU PHI EPSILON ALUMNI NEWSLETTER RATING SHEET

Chapters earn points as specified below

<b>IDENTIFICATION (TOP OF FIRST SHEET)</b>	<b>Potential Points</b>	<b>Points Awarded</b>
Chapter Name	10	
Mu Phi Epsilon	10	
Crest/Logo	5	
Date of publication	10	
<b>TOTAL POINTS – IDENTIFICATION</b>	<b>35</b>	

<b>CONTENTS</b>	<b>Potential Points</b>	<b>Points Awarded</b>
Clarity and accuracy of all information (About Mu Phi Epsilon)	5	
Complete names used	5	
Newsworthy items pertaining to chapter, members and patrons	10	
<b>TOTAL POINTS – CONTENTS</b>	<b>20</b>	

<b>FURTHER CONSIDERATIONS</b>	<b>Potential Points</b>	<b>Points Awarded</b>
Creativity		
Photos of Chapter activities	10	
Layout	10	
Name of newsletter	5	
Use of color	2	
Style of writing	2	
Frequency of publication		
Monthly (10 points) Quarterly (5 points)	3-10	
Fewer than 4 (3 points)		
Available as an email document	10	
<b>TOTAL POINTS – FURTHER CONSIDERATIONS</b>	<b>42-49</b>	

**GRAND TOTAL                    97-104**

## MU PHI EPSILON YEARBOOK RATING SHEET

Chapters earn points as specified below

<b>COVER (REQUIRED)</b>	<b>Potential Points</b>	<b>Points Awarded</b>
Chapter Name and Founding Date	2	
Mu Phi Epsilon	2	
Years Covered	1	
Mu Phi Crest/Logo	2	
Other Musical Symbols	1	
<b>TOTAL POINTS – COVER</b>	<b>8</b>	

<b>REQUIRED CONTENTS</b>	<b>Potential Points</b>	<b>Points Awarded</b>
Chapter Name and Founding Date	2	
Committees/Chairmen	2	
Date/Time of Meetings	2	
Roster of Members	2	
Name & Address with 9-digit zip code	1	
Area Code & Phone Number	1	
Email Address	2	
Music Field	1	
Non-resident Members	1	
Visiting Members	1	
Patrons	1	
District Director	1	
Programs	1	
6 Regular Programs	12	
2 Public Programs	4	
Listing – Date, Host, Program	6	
Officer Installation	1	
Founder's Day Program	4	
Chapter website address	3	
<b>TOTAL POINTS – REQUIRED CONTENT</b>	<b>48</b>	

<b>ADDITIONAL SUGGESTIONS/CONSIDERATIONS</b>	<b>Potential Points</b>	<b>Points Awarded</b>
International Executive Board/Foundation Board	2	
Creed/Purpose/Aims/Founders	4	
Date of Fraternity Founding/Theme for the Year	2	
Our Triangle Song	2	
Past Presidents/ Collegiate Chapter(s) Supported	2	
Collegiate Presidents, Advisors, Table of Contents	<b>3</b>	
Directions to Homes	1	
Scholarship Award Winners/Violet Awardees	2	
Past International Officers from Chapter	1	
<b>TOTAL POINTS – FURTHER CONSIDERATIONS</b>	<b>19</b>	

**GRAND TOTAL                      75**

## MU PHI EPSILON

### ALUMNI CHAPTER WEBSITE RATING SHEET

Chapters earn points as specified below

<b>OPENING SCREEN (REQUIRED CONTENT)</b>	<b>Potential Points</b>	<b>Points Awarded</b>
Chapter Name	3	
Mu Phi Epsilon	3	
Mu Phi Crest/Logo	3	
Other Musical Symbols	1	
Links to Contents Listed Below	5	
<b>TOTAL POINTS – COVER</b>	<b>15</b>	

<b>REQUIRED CONTENTS FROM CURRENT YEAR</b>	<b>Potential Points</b>	<b>Points Awarded</b>
Theme for the year	3	
Chapter Officers	5	
Committee/Chairmen	5	
Date/Time of Meetings	5	
Roster of Members	5	
Music Field	2	
Programs	5	
Information on becoming a member	10	
Photos from current events	10	
<b>TOTAL POINTS – REQUIRED CONTENTS</b>	<b>50</b>	

<b>ADDITIONAL LINKS &amp; CONSIDERATIONS</b>	<b>Potential Points</b>	<b>Points Awarded</b>
Fraternity Website	5	
Foundation Website	5	
Creed/Purpose/Aims/Founders	5	
Local Collegiate Chapters Contact Information & Location	5	
Scholarship Award Winners	2	
Historical Chapter Items such as programs	3	
Scholarship Winners, etc.		
<b>TOTAL POINTS – FURTHER CONSIDERATIONS</b>	<b>25</b>	

<b>GRAND TOTAL</b>	<b>90</b>	
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