



THE UNIVERSITY OF ARIZONA

Fraternity & Sorority Programs

Expansion Policy and Procedures

Updated July 14, 2021

Expansion Policy and Procedures

Throughout the text of this policy, the word "fraternity" is used synonymously with "sorority."

I. Expansion Committee

- a. The Expansion Committee shall deal with all matters pertaining to the expansion of the Greek community. All action in the areas of expansion must be approved and sanctioned by this committee.
 - i. The Expansion Committee is a joint Interfraternity Council (IFC), Panhellenic Council (PHC), and United Sorority and Fraternity Council (USFC).
 1. It shall consist of, but not be limited to, the following individuals: IFC President, Panhellenic President, USFC President, ASUA Executive Vice President, and chapter president from the two chapters that were most recently chartered/colonized chapter(s) on campus.
- b. A Fraternity & Sorority Programs staff member serves as an ex-officio member of the Expansion Committee.
 - i. All members of the Expansion Committee are appointed by the designated Fraternity & Sorority Programs staff member in charge of coordinating the Expansion Committee.
 - ii. All members shall serve a one-year term (two semesters). This term shall last throughout the members' other concurrent term (as listed above).
- c. Duties
 - i. To regularly report all committee activities to the Fraternity & Sorority Programs staff, and the IFC, USFC and PHC governing councils
 - ii. To review expansion packets and the chartering/colonization guidelines bi-annually to ensure that they reflect the current IFC, USFC, PHC, and University policies and guidelines
 - iii. To coordinate all expansion activities

II. Procedures for Expansion

- a. Extension for National Panhellenic Conference
 - i. Sorority extension shall occur through a formal extension plan approved by the Panhellenic Council, the University, and by following the outlined Extension Procedures, found in the National Panhellenic Conference Manual of Information.
- b. Fraternity/Sorority Expansion for National Organizations not part of the National Panhellenic Conference
 - i. Fraternity/sorority expansion may occur in two ways:
 1. Through a formal expansion plan approved by the IFC or USFC and the University

2. Through receiving a formal petition for expansion by a headquarters, interest group, or colony.
 - a. Once a formal petition has been received from an interested group the organization has one year from the date of formal petition to finish the expansion process.
 - b. Once the year expires, without finishing the expansion process, the organization must begin the process again from the beginning.

III. Deadlines

- a. Expansion packets received by the Fraternity and Sorority Programs will be reviewed bi-annually by the following timeline
 - i. October 1 - deadline for expansion packets for groups interested in expanding during the spring semester
 - ii. March 1 - deadline for expansion packets for groups interested in expanding during the fall semester

IV. Procedures for Petitioning Groups (IFC, NPHC, USFC and Non-NPC Organizations)

- a. Duties of the Expansion Committee
 - i. Determine need for expansion.
 - ii. Gain approval from IFC, PHC, USFC, and the University for expansion.
 - i. Contact those national organization(s) with a letter of interest on file with a history on the University of Arizona campus. Notify them of the plan.
 - iii. Obtain materials and items to be reviewed from those national organizations interested (see below).
 - iv. Expansion Committee reviews packets and determines the groups to be invited to make presentations and meet with University officials.
 - v. Presentations and meetings are scheduled with the Fraternity & Sorority Programs Staff, Dean of Students Office, Expansion Committee, and IFC, PHC, and USFC.
 1. There will be two presentations total.
 - vi. The Dean of Students makes the final decision as to whether or not to invite the National organization to colonize.
- b. Duties of the petitioning organization
 - vii. Submit a letter of intent to request permission to proceed with expansion at The University of Arizona with support from the Inter/National Headquarters.
 1. The Expansion Committee reserves the right to not schedule a group for expansion if all aspects of requested materials are not provided.
 2. The Expansion Committee reserves the right to waive any of the following aspects of the documentation for any reason.

- viii. Provide the following materials to the Expansion Committee in a PDF document emailed to the Assistant Director, for review and possible invitation to make a presentation
 1. Alumni Information
 - a. Provide the total number of alumni residing in Tucson
 - b. Provide documentation of interest and support of the Tucson alumni in establishing a chapter
 - c. Identify an alumnus/na located in Tucson who will be the designated Chapter Advisor
 - d. List additional alumni who are interested in working with the chapter in an advisory capacity.
 - i. Please list the city of the alumni members' location with their name and contact information
 - ii. Location of the nearest alumni club, organization, and/or graduate chapter
 2. A copy of the fraternity constitution and bylaws
 - a. Please include both national and local
 3. A copy of the following Inter/National Headquarters policies
 - a. Hazing policy
 - b. Sexual Assault policy and program(s)
 - c. Alcohol and Other Drug Abuse policy and program(s)
 - d. Scholarship policies and program(s)
 - e. Documentation of an internal judicial process for holding members accountable who violate organization, university, state, and/or federal policies
 - f. Membership Education policy and program(s)
 - g. Rush, Recruitment, Membership, and/or Intake policy and program(s)
 - h. Leadership Development and Officer Transition program(s)
 - i. Advisor Training and Development program(s)
 - j. Program for chartering or colony group
 - k. Chartering requirements
 - l. Chapter Accreditation Process/Standards for Chartered Chapters
 - m. A detailed explanation of the Inter/National Headquarter's philosophy around contact and partnership with the host institution
 - n. A description of the policies, procedures, and plans for housing
 - a. Including temporary and permanent plans within the next five (5) years and ten (10) years
 - o. A copy of the national magazine and/or publication
 - p. Chartering, colonization, and/or establishment procedures and standards for chartering a chapter, including the following specific information: Minimum expectations of colony for existence and chartering

4. Anticipated timeline for UA colony chartering
 - a. A detailed description of the organization's recruitment plan for the next four (4) semesters
5. A plan for maintaining regular contact with the Fraternity and Sorority Programs office during the chartering or colony phase
6. Statistical information on National strength
 - a. Total number of chapters nationwide and distribution area
 - b. Total number of chapters and colonies in Arizona and West Coast regions
 - A. Specifically listing each group and their location
 - c. Total number of chartering or colonization groups during the past five (5) years
 - A. Include the location, number chartered, and number failed with the reasons for failed expansion
 - d. Two (2) Campus Based Professionals Letters of Reference from recent expansions
 - e. Total number of initiated members
 - f. Total number of chartering or colonization groups anticipated this year and where, including timeline for founding each
 - g. The number of chapter closure(s) during the last three (3) years
 - A. Include the location, when it occurred, and why the chapter was closed
 - h. Average size of chapters on campuses similar to The University of Arizona
7. Information on National support
 - a. Number of traveling consultants, description of program, and commitment of time for this expansion
 - b. Advisor program, specific to this expansion
 - c. Description of National staff assistance to chartering or colony group and established chapters
 - A. For example: while a chartering or colony group, after chartering, and as an established chapter
 - d. Description of convention(s), leadership program(s), and/or programs available to chartering or colony members
 - e. National expansion budget and percentage allotted to the chartering or colony group
8. A summary of the organizational structure of the fraternity at the chapter and inter/national levels
9. Expanding organizations mission and values statement with an explanation for how the colony/chapter will remain relevant to those values during their tenure at The University of Arizona

10. Expanding organizations should articulate a plan for how they will create positive relationships with other chapters and with key constituents across campus/community

11. Local purposes and goals

- Include a description of how these goals were formulated

a. Short term goals

- Goals while still a chartering or colony group

b. Goals for within two (2) years of chartering

c. Vision for three (3) to five (5) years for the colony/chapter should be presented in the expansion packet and during the presentation. At a minimum the vision should include:

i. Membership numbers

ii. Campus Involvement

iii. Community Involvement

iii. Academics

iv. Leadership Development

v. Membership Education Initiatives

vi. Diversity, Equity, and Inclusion

d. Long term goals, within five to ten years

12. If a group is returning to campus or from a disciplinary action, describe the following:

a. Reasons why the chapter left campus, and when

b. How the group plans to avoid this from happening again

c. How the group has cleared up any debts or circumstances still left incomplete from when previously on campus (if applicable)

c. Petitioning organizations who are invited by the expansion committee to make a campus presentation should follow these guidelines for their expansion presentation

i. An Inter/National Headquarters staff member or volunteer must be present for the presentation if there are no current collegiate members as part of the petitioning group

ii. The Chapter Advisor listed in the expansion packet must be present for the presentation

iii. The expansion presentation should be no longer than 30 minutes in length and the presenters should be prepared to answer questions from the audience at the close of their presentation

d. Expansion presentations should include the following information at minimum

i. Total number of alumni in Tucson.

- ii. Explained interest and support of the Tucson alumni in establishing a chapter.
- iii. An alumnus/na located in Tucson who will be the designated Chapter Advisor
- iv. A list of additional alumni who are interested in working with the chapter in an advisory capacity
- v. Nearest alumni club/organization/graduate chapter
- vi. Hazing policy
- vii. Sexual Assault policy and program
- viii. Alcohol and Substance Abuse policy and program
- ix. Scholarship policies and program
- x. Membership Education policy and program
- xi. Rush/Recruitment/Membership Intake policy and program
- xii. Leadership Development and Officer Transition programs
- xiii. Advisor Training and Development program
- xiv. Chapter Accreditation Process/Standards for Chartered Chapters
- xv. A detailed explanation of the Inter/National organization's philosophy around contact and partnership with the host institution
- xvi. Expanding organizations mission and values statement with an explanation for how the colony/chapter will remain relevant to those values during their tenure at UA
- xvii. Expanding organizations should articulate a plan for how they will create positive relationships with other chapters and with key constituents across campus/community
- xviii. Short term goals (while still a colony/new group)
- xix. Goals for within two years of chartering
- xx. Vision for 3 to 5 years for the colony/chapter should be presented in the expansion packet and during the presentation. At a minimum the vision should include
 - 1. Membership numbers
 - 2. Campus Involvement
 - 3. Community Involvement
 - 4. Academics
 - 5. Leadership Development
 - 6. Membership Education Initiatives
 - 7. Diversity, Equity, and Inclusion
 - 8. If a group is returning to campus or from a disciplinary action, describe the following
 - a. Reasons why the chapter left campus and when
 - b. How the group plans to avoid this from happening again

V. Procedures for Formal Extension Plan (NPC Organizations)

- a. Duties of the Expansion Committee
 - i. Determine need for extension

- ii. Determine number of inter/national organizations to be involved in the expansion plan based on need and resources
 - iii. Contact those inter/national organization(s) with a letter of interest on file with a history on The University of Arizona. Notify inter/national organization(s) of the plan and invite them to submit materials (defined below)
 - iv. Obtain materials and items to be reviewed from those national organizations interested (see below)
 - v. Expansion Committee reviews expansion packets and determines the groups to be invited to make presentations and meet with University officials
 - vi. Presentations and meetings are scheduled with the Dean of Students Office, Expansion Committee, IFC, PHC, and USFC.
 - 1. There may be two presentations total (council and community wide)
 - vii. The Dean of Students makes the final decision as to whether or not to invite the organization to colonize
- b. Duties of the petitioning organization
- i. Submit a letter of intent to request permission to proceed with expansion at The University of Arizona with support from the Inter/National Headquarters.
 - 1. The Expansion Committee reserves the right to not schedule a group for expansion if all aspects of requested materials are not provided.
 - 2. The Expansion Committee reserves the right to waive any of the following aspects of the documentation for any reason.
 - ii. Provide the following materials to the Expansion Committee, for review and possible invitation to make a presentation
 - 1. Alumni Information
 - a. Provide the total number of alumni residing in Tucson
 - b. Provide documentation of interest and support of the Tucson alumni in establishing a chapter
 - c. An alumnus/na located in Tucson who will be the designated Chapter Advisor
 - d. List additional alumni who are interested in working with the chapter in an advisory capacity.
 - i. Please list the city of the alumni members' location with their name and contact information
 - ii. Location of the nearest alumni club, organization, and/or graduate chapter
 - 2. A copy of the fraternity constitution and bylaws
 - a. Please include both national and local
 - 3. A copy of the following Inter/National Headquarters policies
 - a. Hazing policy
 - b. Sexual Assault policy and program(s)
 - c. Alcohol and Other Drug Abuse policy and program(s)

- d. Scholarship policies and program(s)
 - e. Documentation of an internal judicial process for holding members accountable who violate organization, university, state, and/or federal policies
 - f. Membership Education policy and program(s)
 - g. Rush, Recruitment, Membership, and/or Intake policy and program(s)
 - h. Leadership Development and Officer Transition program(s)
 - i. Advisor Training and Development program(s)
 - j. Program for chartering or colony group
 - k. Chartering requirements
 - l. Chapter Accreditation Process/Standards for Chartered Chapters
 - m. A detailed explanation of the Inter/National Headquarters' philosophy around contact and partnership with the host institution
 - n. A description of the policies, procedures, and plans for housing
 - a. Including temporary and permanent plans within the next five (5) years and ten (10) years
 - o. A copy of the national magazine and/or publication
 - p. Chartering, colonization, and/or establishment procedures and standards for chartering a chapter, including the following specific information: Minimum expectations of colony for existence and chartering
4. Anticipated timeline for UA colony chartering
 - a. A detailed description of the organization's recruitment plan for the next four (4) semesters
 5. A plan for maintaining regular contact with the Fraternity and Sorority Programs office during the chartering or colony phase
 6. Statistical information on National strength
 - a. Total number of chapters nationwide and distribution area
 - b. Total number of chapters and colonies in Arizona and West Coast regions
 - A. Specifically listing each group and their location
 - c. Total number of chartering or colonization groups during the past five (5) years
 - A. Include the location, number chartered, and number failed with the reasons for failed expansion
 - d. Two (2) Campus Based Professionals Letters of Reference from recent expansions
 - e. Total number of initiated members
 - f. Total number of chartering or colonization groups anticipated this year and where, including timeline for

- g. The number of chapter closure(s) during the last three (3) years
 - A. Include the location, when it occurred, and why the chapter was closed
 - h. Average size of chapters on campuses similar to The University of Arizona
7. Information on National support
- a. Number of traveling consultants, description of program, and commitment of time for this expansion
 - b. Advisor program, specific to this expansion
 - c. Description of National staff assistance to chartering or colony group and established chapters
 - A. For example: while a chartering or colony group, after chartering, and as an established chapter
 - d. Description of convention(s), leadership program(s), and/or programs available to chartering or colony members
 - e. National expansion budget and percentage allotted to the chartering or colony group
8. A summary of the organizational structure of the fraternity at the chapter and inter/national levels
9. Expanding organizations mission and values statement with an explanation for how the colony/chapter will remain relevant to those values during their tenure at The University of Arizona
10. Expanding organizations should articulate a plan for how they will create positive relationships with other chapters and with key constituents across campus/community
11. Local purposes and goals
- Include a description of how these goals were formulated
 - a. Short term goals
 - Goals while still a chartering or colony group
 - b. Goals for within two (2) years of chartering
 - c. Vision for three (3) to five (5) years for the colony/chapter should be presented in the expansion packet and during the presentation. At a minimum the vision should include:
 - iii. Academics
 - iv. Membership numbers
 - v. Campus Involvement
 - vi. Community Involvement
 - iv. Leadership Development

- v. Membership Education Initiatives
 - vi. Diversity, Equity, and Inclusion
 - d. Long term goals, within five to ten years
12. If a group is returning to campus or from a disciplinary action, describe the following:
- d. Reasons why the chapter left campus, and when
 - e. How the group plans to avoid this from happening again

VI. Additional Information

- a. It is recommended that the Expansion Committee consider organizations who have filed current letters of interest with the University, IFC, USFC or PHC.
- b. It is recommended that organizations wishing to re-establish a colony/chapter at The University of Arizona campus wait at least six (6) full semesters (fall/spring) before entering the expansion process
- c. Presentations will be made to the IFC, USFC, and PHC at a meeting with all member organization chapter presidents in attendance
- d. Evaluations from the Expansion Committee, Dean of Students, Fraternity & Sorority Programs staff, chapter presidents, and the information submitted by the inter/national organization will be the information used to make the decision as to which organization will be given an invitation to colonize/proceed with the Greek-letter organization recognition process.
- e. Three (3) possible recommendations are as follows
 - i. Recommend
 - 1. An invitation to proceed with recognition to a specific fraternity
 - ii. Not Recommend
 - 1. No invitation should be extended at this time with specific reasons as to why and when another presentation may be made
 - iii. More information is needed
 - 1. Before a final decision may be made, additional information, clarification, and/or questions will be sent to the petitioning group for response
- f. Upon approval of the Dean of Students, all parties will be notified with an official letter of recognition
- g. After receiving approval, the National organization will be extended an invitation to colonize
 - i. If a local interest group, colony, or chapter already exists, the group may proceed with the Greek-letter organization recognition process
 - ii. This process is coordinated by Fraternity & Sorority Programs
- h. After receiving recognition, the chartering or colony group will need to apply for Associate Member status in IFC, USFC, and PHC and are subject to, but not limited to, the Colony Requirements section of this document
- i. The Dean of Students reserves the right to require specific conditions to be met in order to proceed with and maintain Greek-letter organization recognition
- j. The Expansion Committee reserves the right to request additional materials

- and/or documentation in order to recommend, invite, and/or schedule a group for expansion presentations
- k. Each organization entering into the expansion process is strongly encouraged to adopt and support alcohol and substance free housing when considering and explaining housing options.
 - i. If a group does not support and adopt alcohol and substance free housing, they must prepare and present a comprehensive analysis of this decision during the expansion presentations

VII. Expansion Procedures

- a. The expanding organization must consult with the Expansion Committee and Fraternity & Sorority Programs regarding all colonization plans and procedures
- b. The Expansion Committee and Fraternity & Sorority Programs will specify to the Inter/National fraternity guidelines for beginning and completing the expansion process
- c. The Expansion Committee and Fraternity & Sorority Programs will help provide any necessary service and information to the Inter/National fraternity regarding expansion, University, IFC, USFC, and PHC guidelines, policies, procedures, rules, and regulations

VIII. Chartering, Colony, or New Chapter Requirements

- a. If necessary, the Expansion Committee, IFC, USFC, PHC, or the University can waive any of the following requirements
- b. The colony is responsible for adhering to all requirements as outlined in the Maintaining Recognition Section of the *Student Organization Handbook* and *Appendix I* of the *Greek Relationship Statement*
- c. Representatives of the chartering or colony group must attend all IFC, USFC, or PHC meetings as an Associate Member and are strongly encouraged to participate in all Greek community activities
- d. The chartering or colony group shall maintain an active Advisory Committee, consisting of the Chapter Advisor, who must be located in Tucson, and at least two (2) additional alumni and/or volunteers
 - i. The Advisory Committee shall be trained by the Inter/National fraternity
 - ii. The Chapter Advisor needs to attend all meetings as scheduled for advisors by Fraternity & Sorority Programs, IFC, USFC, PHC, or the University
 - iii. The Chapter Advisor is expected to hold regular meetings with Fraternity & Sorority Programs staff
- e. During the chartering or colony period, the chartering or colony group shall develop programming in the following areas, with records of these provided as requested by the Fraternity & Sorority Programs Office
 - i. Membership Education
 - ii. Rush, Recruitment and/or Membership Intake

- iii. Academic Success
- iv. Officer Training and Transition
- v. Financial Responsibilities
- vi. Alumni Relations
- vii. Social Programming
 - 1. Include alcohol and substance abuse and risk management education
- viii. Community Service
- ix. Philanthropic Efforts
- x. Sexual Assault and Harassment Education
- xi. New Member Education
- xii. Anti-Hazing Education
- xiii. Local IFC, USFC, or PHC involvement
- xiv. Diversity, Equity, and Inclusion
- xv. Other activities as outlined by the organization and the University
- f. The colony shall have a national representative visit at a minimum at least one (1) time each year for as long as the chartering or colony process continues
 - i. This representative shall meet with a staff member from Fraternity & Sorority Programs each semester to provide updates on the process
- g. The officers of the chartering or colony group shall be responsible for keeping all records within Fraternity & Sorority Programs current and complete
- h. The colony must file with Fraternity & Sorority Programs a current certificate of insurance verifying liability and social host insurance coverage at the required amount (See the Student Organization Policy Handbook)
- i. Failure to meet any of the above requirements within one (1) year of the official recognition letter shall result in a review by the Dean of Students, Expansion Committee, IFC, USFC, and PHC Executive Board Officers, and a Fraternity & Sorority Programs staff member to determine status of recognition

IX. Follow-Up Review Presentation

- a. One (1) full-year following the expansion presentations or immediately following chartering (which ever comes first) the fraternity must prepare a follow-up review presentation
 - i. This will be coordinated with a Fraternity & Sorority Programs staff member
 - ii. The purpose of this presentation is to allow the fraternity to demonstrate their progress since their last presentations and since receiving their charter
 - iii. This presentation should include, but not limited to the following
 - 1. Membership statistics within the most recent two (2) semesters
 - a. Recruitment or intake numbers, chapter membership numbers, academic information, etc.
 - b. How the organization has developed and implemented programming in the following areas:

- A. Membership Education
 - B. Rush/Recruitment/Membership Intake
 - C. Academic Success
 - D. Officer Training and Transition
 - E. Financial Responsibilities
 - F. Alumni Relations
 - G. Social Programming
 - 1. Include alcohol and substance abuse and risk management education
 - H. Community Service
 - I. Sexual Assault and Harassment
 - J. New Member Education and Hazing
 - K. Local IFC, USFC, or PHC involvement
 - L. Diversity, Equity, and Inclusion
 - M. Other activities as outlined by the organization and the University
 - N. Goals of the organization, and how have successfully/unsuccessfully they met previous goals
 - O. Description of the change within the organization since the expansion presentation
 - P. Description of the organizations' mission and values statement with an explanation for how the colony/chapter will remain relevant to those values during their tenure at UA.
 - Q. A timeline for three (3) to five (5) years for the colony/chapter should be presented at a minimum the vision should include
 - 1. Membership numbers
 - 2. Campus Involvement
 - 3. Community Involvement
 - 4. Academics
 - 5. Leadership Development
 - 6. Membership Education Initiatives
 - 7. Diversity, Equity, and Inclusion
- iv. This presentation will be given to the Fraternity & Sorority Programs Staff and IFC, USFC, and PHC.

X. IFC, USFC, PHC Membership

- a. The chartering or colony group can petition its respective council for full membership status after the following requirements are met
 - i. Fulfill the above colony requirements
 - ii. Receive its charter from the Inter/National organization

- iii. Has made the required follow-up review presentation
- b. IFC, USFC, or PHC may determine how full membership status is granted

XI. Dormant Chapters

- a. Chapters' membership that fall below five (5) undergraduate active members, which is required for all student organizations at the University of Arizona, have two (2) semesters to reach the required membership
 - i. Chapters that fail to meet this requirement will be considered dormant
- b. Chapters that fall below the required five (5) undergraduate active members must be in good standing with the University, must retain updated insurance, need to be in good standing financially with the University and their respective governing council, and need to have attained at least a Chapter of Promise level during the most recent Standards of Excellence accreditation in order to be eligible for dormant status
 - i. After a chapter has become dormant, a chapter has a period of one (1) year to reorganize on campus
 - ii. Chapters that fail to reorganize and do not meet the official requirements to be a recognized fraternity within the established timeframe will be considered not recognized
 - iii. Chapters that do not meet the requirements outlined in this section must petition for expansion as indicated by the procedures outlined in this document.
- c. Unrecognized chapters must petition for expansion as indicated by the procedures outlined in this document in order to return to the University of Arizona.

XII. Governing Councils

- a. All recognized fraternity and sorority chapters at the University are required to retain membership in either IFC, USFC, or PHC
- b. Chapters wishing to switch governing councils will have to complete the following
 - i. The chapter wishing to switch governing councils must schedule a meeting with the appropriate council leadership and advisor regarding council membership eligibility as each council is free to set their own requirements
 - 1. Note: Not all councils will be able to grant full membership status
 - ii. The chapter must submit a letter of intent to switch councils outlining their rationale for switching governing councils
 - 1. Upon receiving the letter of intent, the council president will schedule a presentation time with the petitioning chapter
 - a. Presentations will follow the outline set above in this document
 - 2. IFC, USFC, or PHC may waive the presentation requirement in order to grant membership status to a group, if so desired

XIII. Last Updated on July 14, 2021