

**EXPANSION  
PROCEDURES  
AT  
THE  
UNIVERSITY  
OF  
ARIZONA**

## Expansion Procedures at The University of Arizona

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

### I. EXPANSION COMMITTEE

- A. Purpose: 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.
- B. Membership: The Expansion Committee is a joint Interfraternity Council (IFC)/National Pan-Hellenic Council (NPHC)/Panhellenic Council (PHC) committee/United Sorority and Fraternity Council (USFC). It shall consist of, but not be limited to, the following individuals: IFC President, Panhellenic President, NPHC President, USFC President, ASUA Executive Vice President, and chapter president from the two chapters that were most recently chartered/colonized chapter(s) on campus.
- C. A Fraternity & Sorority Programs staff member serves as an ex-officio member of the Committee. All members of the Committee are appointed by the designated Fraternity & Sorority Programs staff member in charge of coordinating the Committee. All members shall serve a one year term (two semesters). This term shall last throughout the members’ other concurrent term (as listed above).
- D. Duties:
- To regularly report all committee activities to the Fraternity & Sorority Programs staff, and the IFC, NPHC, USFC and PHC bodies.
  - To review Expansion Materials and the Expansion and Colonization Guidelines bi-annually to ensure that they reflect the current IFC, NPHC, USFC, PHC, and University policies and guidelines.
  - To coordinate all expansion activities.

### II. PROCEDURES FOR EXPANSION

- A. Sorority Extension for National Panhellenic Conference: Sorority extension shall occur through a formal extension plan approved by Panhellenic and 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 Fraternity/sorority expansion may occur in two ways: (1) through a formal expansion plan approved by the IFC/NPHC/USFC and the University, and (2) through receiving a formal petition for expansion by a headquarters, interest group, or colony. 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. Once the year expires, without finishing the expansion process, the organization must begin the process again from the beginning.
- C. **Expansion materials received by the Fraternity and Sorority Programs will be reviewed bi-annually following the following timeline:**
- October 1<sup>st</sup> deadline for expansion packets for groups interested in expanding during the spring semester**
  - March 1<sup>st</sup> deadline for expansion packets for groups interested in expanding**

## during the fall semester

### III. PROCEDURES FOR PETITIONING GROUPS (IFC, NPHC, USFC and Non-NPC Sororities):

#### A. Duties of the Expansion Committee

- Determine need for expansion.
- Gain approval from IFC, NPHC, PHC, USFC, and the University for expansion. 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.
- Obtain materials and items to be reviewed from those national organizations interested (see below).
- **Expansion Committee reviews materials and determines the groups to be invited to make presentations and meet with University officials.**
- Presentations and meetings are scheduled with the Fraternity & Sorority Programs Staff/Dean of Students Office/Expansion Committee and IFC/NPHC/PHC/USFC. There will be two presentations total.
- **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:

- Provide a current, written request expressing the desire to establish a group at The University of Arizona, accompanied by documentation and supporting materials by the National organization. The Expansion Committee reserves the right to not schedule a group for expansion if all aspects of requested materials are not provided. Also, the Expansion Committee reserves the right to waive any of the following aspects of the documentation for any reason.
- Provide the following materials to the Expansion Committee, for review and possible invitation to make a presentation. Two copies of the following should be submitted in a 3 ring binder or via electronic. (\* if applicable)
  - Alumni Information:
    - Total number of alumni in Tucson.
    - Explained interest and support of the Tucson alumni in establishing a chapter.
    - A list of specific alumni who have already indicated interest in working with the chapter in an advisory capacity. At a minimum one of these alumni advisors must be located in the Tucson area. Please list the city of the alumni member's location with their name and contact information.
    - Nearest alumni club/organization/graduate chapter.
  - A copy of the fraternity constitution/bylaws, both national and local.)
  - A copy of the following National policies:
    - Hazing policy
    - Sexual Assault policy and program
    - Alcohol and Substance Abuse policy and program
    - Scholarship policies and program
    - Documentation of an internal judicial process for holding members accountable who violate organization, university or state and federal

policies

Membership Education policy and program

Rush/Recruitment/Membership Intake policy and program

Leadership Development and Officer Transition programs

Advisor Training and Development program

Program for Colonies

Chartering requirements

Chapter Accreditation Process/Standards for Chartered Chapters (\*)

- A detailed explanation of the Inter/National organization's philosophy around contact and partnership with the host institution,
  
- A description of the policies, procedures, and plans for housing (Including temporary and permanent plans within the next five years, and ten years) (\*)
- A copy of the national magazine/publication (\*)
- Colonization/establishment procedures and standards for chartering a chapter, including the following specific information: Minimum expectations of colony for existence and chartering
- Anticipated timeline for UA colony chartering
  - A detailed description of the organization's recruitment plan for the next 4 semesters
- A plan for maintaining regular contact with the Fraternity and Sorority Programs office during the chartering phase
- Statistical information on National strength:
  - Total number of chapters nationwide and distribution area
  - Total number of chapters and colonies in Arizona and West Coast regions, specifically listing each
  - Total number of colonizations during the past five (5) years, including where, number chartered, number failed (reasons behind closures)
  - Two (2) Campus Based Letters of Reference from recent expansions
  - Total number of initiated members
  - Total number of colonizations anticipated this year and where, including timeline for founding each
  - The number of chapters lost during the last three (3) years, including where, when, and why
  - Average size of chapters on campuses similar to UA
- Information on National support and assistance
  - Number of traveling consultants, description of program, and commitment of time for UA group (\*)
  - Advisor program, specific to UA group
  - Description of National staff assistance to colonies and established chapters (i.e., while a colony, after chartering, etc.)
  - Description of conventions, leadership schools, or programs available to colony members
  - National expansion budget, and percentage allotted to UA group
- A summary of the organizational structure of the fraternity at the chapter

and National levels

- 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.
- Expanding organizations should articulate a plan for how they will create positive relationships with other chapters and with key constituents across campus/community
- Local purposes and goals, including a description of how these goals were formulated:
  - Short term goals (while still a colony/new group)
  - Goals for within two years of chartering
  - 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:
    - Membership numbers
    - Campus Involvement
    - Community Involvement
    - Academics
    - Leadership Development/Membership Education Initiatives
    - Diversity
- Long term goals, within five to ten years
- If a group is returning to campus or from a disciplinary action, describe the following:
  - Reasons why the chapter left campus, and when
  - How the group plans to avoid this from happening again
  - How the group has cleared up any debts or circumstances still left incomplete from when previously on campus (if applicable)
- Petitioning organizations who are invited by the expansion committee to make a campus presentation should follow these guidelines for their expansion presentation:
  - An Inter/National staff member or volunteer must be present for the presentation if there are no current collegiate members as part of the petitioning group.
  - The local Tucson advisor listed in the expansion packet must be present for the presentation.
  - 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.
  - Expansion presentations should include the following information at minimum:
    - Total number of alumni in Tucson.
    - Explained interest and support of the Tucson alumni in establishing a chapter.
    - A list of specific alumni who have already indicated interest in working with the chapter in an advisory capacity.
    - Nearest alumni club/organization/graduate chapter.
    - Hazing policy

- Sexual Assault policy and program
- Alcohol and Substance Abuse policy and program
- Scholarship policies and program
- Membership Education policy and program
- Rush/Recruitment/Membership Intake policy and program
- Leadership Development and Officer Transition programs
- Advisor Training and Development program
- Chapter Accreditation Process/Standards for Chartered Chapters (\*)
  - A detailed explanation of the Inter/National organization's philosophy around contact and partnership with the host institution,
- 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.
- Expanding organizations should articulate a plan for how they will create positive relationships with other chapters and with key constituents across campus/community
- Short term goals (while still a colony/new group)
- Goals for within two years of chartering
- 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
  - Membership numbers
  - Campus Involvement
  - Community Involvement
  - Academics
  - Leadership Development/Membership Education Initiatives
  - Diversity
- If a group is returning to campus or from a disciplinary action, describe the following:
  - Reasons why the chapter left campus, and when
  - How the group plans to avoid this from happening again

#### IV. PROCEDURES FOR FORMAL EXTENSION PLAN (NPC Organizations):

##### A. Duties of the Expansion Committee

- Determine need for extension.
- Determine number of National organizations to be involved in the expansion plan based on need and resources.
- 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 and invite them to submit materials (defined below).
- Obtain materials and items to be reviewed from those national organizations interested (see below).

- Expansion Committee reviews materials and determines the groups to be invited to make presentations and meet with University officials.
- Presentations and meetings are scheduled with the Dean of Students Office/Expansion Committee and IFC/NPHC/PHC/USFC. There may be two presentations total (council and community wide).
- The Dean of Students makes the final decision as to whether or not to invite the organization to colonize.

B. Duties of the Inter/National expanding organization:

- Provide a current, written request expressing the desire to establish a group at The University of Arizona, accompanied by documentation and supporting materials by the Inter/National organization. The Expansion Committee reserves the right to not schedule a group for expansion if all aspects of requested materials are not provided. Also, the Expansion Committee reserves the right to waive any of the following aspects of the documentation for any reason.
- Provide the following materials to the Expansion Committee, for review and possible invitation to make a presentation. All of the following must also be included in the expansion presentations (*\* if applicable*): Alumni Information:
  - Total number of alumni in Tucson.
  - Explained interest and support of the Tucson alumni in establishing a chapter.
  - A list of specific alumni who have already indicated interest in working with the chapter in an advisory capacity. At a minimum one of these alumni advisors must be located in the Tucson area. Please list the city of the alumni member's location with their name.
  - Nearest alumni club/organization/graduate chapter.
- A copy of the fraternity constitution/bylaws, both national and local.)
- A copy of the following National policies:
  - Hazing policy
  - Sexual Assault policy and program
  - Alcohol and Substance Abuse policy and program
  - Scholarship policies and program
  - Documentation of an internal judicial process for holding members accountable who violate organization, university or state and federal policies
  - Membership Education policy and program
  - Rush/Recruitment/Membership Intake policy and program
  - Leadership Development and Officer Transition programs
  - Advisor Training and Development program
  - Chapter Accreditation Process/Standards for Chartered Chapters (\*)
- A detailed explanation of the Inter/National organization's philosophy around contact and partnership with the host institution.
- A description of the policies, procedures, and plans for housing (Including temporary and permanent plans within the next five years) (\*)
- A copy of the national magazine/publication (\*)
- Colonization/establishment procedures and standards for chartering a chapter, including the following specific information: Minimum expectations of colony for existence and chartering
- Anticipated timeline for UA colony chartering including a detailed description of the organization's recruitment plan for the next 4 semesters

- A plan for maintaining regular contact with the Fraternity and Sorority Programs office during the chartering phase
- Statistical information on National strength:
  - Total number of chapters nationwide and distribution area
  - Total number of chapters and colonies in Arizona and West Coast regions, specifically listing each
  - Total number of colonizations during the past five (5) years, including where, number chartered, number failed (reasons behind closures)
  - 2 Campus Based References from recent expansions
  - Total number of initiated members
  - Total number of colonizations anticipated this year and where, including timeline for founding each
  - The number of chapters lost during the last three (3) years, including where, when, and why
  - Average size of chapters on campuses similar to UA
- Information on National support and assistance
  - Number of traveling consultants, description of program, and commitment of time for UA group (\*)
  - Advisor program, specific to UA group
  - Description of National staff assistance to colonies and established chapters (i.e., while a colony, after chartering, etc.)
  - Description of conventions, leadership schools, or programs available to colony members
  - National expansion budget and percentage allotted to UA group
- A summary of the organizational structure of the fraternity at the chapter and National levels
- 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.
- Expanding organizations should articulate a plan for how they will create positive relationships with other chapters and with key constituents across campus/community
- Local purposes and goals, including a description of how these goals were formulated:
- Short term goals (while still a colony/new group)
- Goals for within two years of chartering
- 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
  - Membership numbers
  - Campus Involvement
  - Community Involvement
  - Academics
  - Leadership Development/Membership Education Initiatives
  - Diversity
- Long term goals, within five to ten years
- If a group is returning to campus or from a disciplinary action, describe the following:
  - Reasons why the chapter left campus, and when
  - How the group plans to avoid this from happening again
  - How the group has cleared up any debts or circumstances still left incomplete from when previously on campus (if applicable)

## V. ADDITIONAL INFORMATION

- A. For the purpose of choosing an organization to expand at The University of Arizona, the Expansion Committee shall include a member from the two most recently chartered/colonized chapters on campus to its membership.
- B. It is recommended that the Expansion Committee give consideration to organizations who have filed current letters of interest with the University, IFC, NPHC, USFC or PHC.
- C. It is recommended that organizations wishing to re-establish a colony/chapter at the UA campus wait at least six (6) full semesters (fall/spring) before entering the expansion process with the Expansion Committee.
- D. Presentations will be made to the IFC/NPHC/PHC/USFC at special meetings called by the respective Council president or the council presidents will be invited to the campus wide presentation.
- E. Evaluations from all presentation panel members, and the information submitted by the National organizations, 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.
- F. Three possible recommendations of the panel members are as follows: 1) no invitation should be extended at this time, with specific reasons as to why and when another presentation may be made, 2) more information is needed before a final decision may be made, or 3) an invitation to colonize/proceed with Greek-letter organization recognition should be extended to a specific fraternity.
- G. Upon approval of the Dean of Students, all parties will be notified.
- H. After receiving approval, the National organization will be extended an invitation to colonize. If a local interest group/colony/chapter already exists, the group may proceed with the Greek-letter organization recognition process. This process is coordinated by Fraternity & Sorority Programs.
- I. After receiving recognition, the colony/chapter will be given Associate Member status in IFC/NPHC/PHC/USFC and are subject to, but not limited to, the Colony Requirements section of this document.
- J. The Dean of Students reserves the right to require specific conditions to be met in order to proceed with/maintain Greek-letter organization recognition.
- K. The Expansion Committee reserves the right to request additional materials/documentation in order to recommend, invite, and schedule a group for expansion presentations.
- L. Each organization entering into the expansion process is strongly encouraged to adopt and support alcohol free housing when considering and explaining housing options. If a group does not support and adopt alcohol free housing, they must prepare and present a comprehensive analysis of this decision during the expansion presentations.

## VI. COLONIZATION 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 National fraternity guidelines for beginning and completing colonization.

- C. The Expansion Committee and Fraternity & Sorority Programs will help provide any necessary service and information to the National fraternity regarding colonization, University, Greek and IFC/NPHC/PHC/USFC guidelines, policies, procedures, and rules.

## VII. COLONY/NEW CHAPTER REQUIREMENTS

- A. If necessary, the Expansion Committee, IFC/NPHC/PHC/USFC or the University can wave 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 colony must attend all IFC/NPHC/PHC/USFC meetings as an Associate Member and are encouraged to participate in all Greek community activities.
- D. The colony shall maintain an active Advisory Committee, consisting of at least three alumni or volunteers, with one being local to Tucson and designated as the chapter advisor. The Advisory Committee shall be trained by the National fraternity. The chapter advisor needs to attend all meetings as scheduled for advisors by Fraternity & Sorority Programs, IFC/NPHC/PHC/USFC, or the University. In addition, the advisor is expected to hold regular meetings with Fraternity & Sorority Programs staff.
- E. During the colony period, the colony shall develop programming in the following areas, with records of these provided as requested by the Fraternity & Sorority Programs Office:
- Membership Education
  - Rush/Recruitment/Membership Intake
  - Academic Success
  - Officer Training and Transition
  - Financial Responsibilities
  - Alumni Relations
  - Social Programming (to include substance abuse and risk management education)
  - Community Service
  - Sexual Assault and Harassment
  - New Member Education and Hazing
  - Local IFC/NPHC/PHC/USFC involvement
  - Human Dignity
  - Other activities as outlined by the organization and the University
- F. The colony shall have a national representative visit at a minimum at least once each year for as long as the colony exists. This representative shall meet with a staff member from Fraternity & Sorority Programs each semester.
- G. The officers of the colony shall be responsible for keeping all records within Fraternity & Sorority Programs current and complete each semester.
- 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 year of colonization shall result in a review by the Dean of Students, Expansion Committee, IFC/NPHC/PHC/USFC Executive Officers, and a Fraternity & Sorority Programs staff member to determine status of recognition.

## VIII. FOLLOW-UP REVIEW PRESENTATION:

- A. One full year following the expansion presentations, or immediately following chartering (which ever comes later), the fraternity must prepare a follow-up review presentation. This will be coordinated with a Fraternity & Sorority Programs staff member.
- B. The purpose of this presentation is to allow the fraternity to demonstrate their progress since their last presentations, and since receiving their charter.
- C. This presentation should include, but is not limited to the following aspects:
  - Membership statistics within the most recent two semesters (recruitment/intake numbers, chapter membership numbers, academic information, etc.)
  - How the organization has developed and implemented programming in the following areas:
    - Membership Education
    - Rush/Recruitment/Membership Intake
    - Academic Success
    - Officer Training and Transition
    - Financial Responsibilities
    - Alumni Relations
    - Social Programming (to include substance abuse and risk management education)
    - Community Service
    - Sexual Assault and Harassment
    - New Member Education and Hazing
    - Local IFC/NPHC/PHC/USFC involvement
    - Global Awareness
    - Other activities as outlined by the organization and the University
  - Goals of the organization, and how have successfully/unsuccessfully they met previous goals
  - Description of the change within the organization since the expansion presentation
  - 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.
  - Vision for 3 to 5 years for the colony/chapter should be presented At a minimum the vision should include
    - Membership numbers
    - Campus Involvement
    - Community Involvement
    - Academics
    - Leadership Development/Membership Education Initiatives
    - Diversity
- D. This presentation will be given to the Fraternity & Sorority Programs Staff and IFC/PHC/NPHC/USFC.

## IX. IFC/NPHC/PHC/USFC MEMBERSHIP:

- A. As soon as the colony has: 1) fulfilled the above colony requirements, 2) has received its charter from the Inter/National organization, and 3) has made the required follow-up review presentation, the organization, if required by their respective council may petition its respective Council for full membership status.
- B. IFC/PHC/NPHC/USFC may determine how full membership status is granted.

#### X. DORMANT CHAPTERS

A. Chapters' membership that falls below five (5) undergraduate members, which is required for all students organizations at the University of Arizona, have two (2) semesters to reach the required membership. Chapters that fail to meet this requirement will be considered dormant.

B. Chapters that fall below the required five (5) 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. After a chapter has become dormant, a chapter has a period of one (1) year to reorganize on campus. Chapters that fail to reorganize and do not meet the official requirements to be a recognized fraternity or sorority within the established timeframe will be considered not recognized. 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.

#### XI. GOVERNING COUNCILS

- A. All recognized fraternity and sorority chapters at the University are required to retain membership in either IFC/NPHC/PHC/USFC.
- B. Chapters wishing to switch governing councils will have to complete the following:
  - 1) 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. \*Note\* Not all councils will be able to grant full membership status.
  - 2) The chapter must submit a letter of intent to switch councils outlining their rationale for switching governing councils.
  - 3) Upon receiving the letter of intent, the council president will schedule a presentation time with the petitioning chapter. Presentations will follow the outline set in Section VIII of this document.
  - 4) This presentation will be given to the Fraternity & Sorority Programs Staff, and IFC/NPHC/PHC/USFC.
  - 5) The IFC/NPHC/PHC/USFC may waive the presentation requirement in order to grant Membership status to a group if so desired
  - 6) Chapters may hold dual-membership in governing councils if so desired pending they meet any applicable requirements set by IFC/NPHC/PHC/USFC.

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