



NY Sigma Phi Kappa Theta Alumni Program for Regional Event Subsidies

(APRES SKI)

Program Rules

BROTHERHOOD IS FOR LIFE

The NY Sigma ΦΚΘ Alumni Chapter has initiated an Alumni Program for Regional Event Subsidies, or A.P.R.E.S. Ski. For many of us, our choice to join the Brotherhood of Ski Lodge marks one of the most impactful decisions of our lives. The friendships made with Brothers we lived with, or Alumni met through chapter events, are some of the strongest relationships we have in our lives. Through this program, the Alumni Chapter aims to sponsor social events for Brothers and their families to maintain and solidify the bonds of brotherhood for our members beyond those formative college years.

Specifically, this program provides chapter alumni funds to incentivize brothers to plan, organize, and hold alumni social events in their local communities. The funds are intended to shift the financial risk associated with holding events from individual brothers to the Chapter at large.

PROGRAM GOALS

This program marks an investment in ourselves. Establishing a culture that nurtures a strong and engaged alumni base and engenders spouses and families to the warmth of our community ensures that our membership has a vested interest in the success and long-term well-being of our organization. The direct, measurable goals of the program are to:

- Increase brother participation in Alumni-sponsored events
- Increase the number of brothers who frequently participate in Alumni activities
- Create a series of annual or recurrent events outside of Troy
- Increase total annual donations

FUNDING OPPORTUNITIES

The Board of Trustees has authorized a four-year pilot program to provide up to \$4,000 per year for the four-year period starting Charter Day 2018 and ending Charter Day 2022. There are two semi-annual distribution periods spanning Charter Day to Alumni Weekend and Alumni Weekend to the following Charter Day in each program year. Half of the annual funds will be allocated for each distribution period. Any undisbursed funds in a given period up to the semiannual allocation amount will rollover to the subsequent distribution period.

APPLICATION PROCESS

Each event requesting subsidy funds must submit an APRES Ski Application Form. The APRES Ski Program intends to grant subsidies for all events that do not contain disqualifying characteristics up to the program funding limits.

Applications for each distribution period must be submitted no later than two weeks prior to the start of the distribution period (e.g. two weeks before Charter Day or Alumni Weekend). The Program coordinator will grant subsidies from this application pool to create a broad portfolio of events reflecting the desired traits of the APRES Ski Program.

Applications submitted after the distribution period due date will be considered on a first-apply, first-served basis until distribution period funds are exhausted. These rolling submission applications must be submitted no less than 4 weeks prior to the event to allow time for the Program Coordinator to review the application and help Sponsors advertise the event.

APPLICATION FEATURES

The application requires a minimum of two program Sponsors. Sponsors are responsible for the planning, organizing, advertising, and execution of the event, as well as for providing an event report with photos after the event is held. Additional sponsors can be included to increase the requested subsidy amount. Multiple sponsors are an indication of the local appetite for the event. Sponsors are expected to attend the event and serve as focal points for other Alumni looking for event details.

The application also requires a brief description of the event, requested subsidy amount, and a description of how the funds will be used. Given that applications may be submitted months before the event is held, some event specifics such as actual date and physical location may be identified as To Be Determined (TBD) with approximate timeframes and locations as placeholders. Applications with TBD elements that are awarded subsidies must notify the APRES Ski Chair no less than 3 weeks prior to the event to allow sufficient time to notify the Alumni base at large.

DESIRED EVENT PORTFOLIO TRAITS

With limited funds available, the APRES Ski Program may not be able to fund all qualifying applications. In the event the total requested monies exceed the Program's ability to fund those events, the Program Coordinator will select events to create a portfolio of events that best serves the Alumni Chapter as a whole. Given the program's goals, highest priority will be given to regularly recurring events, pledge class reunions, and events open to large numbers of brothers and their families. Other factors that will be considered include the overall diversity with regards to family events versus brothers-only, geographical locations, activities, and age range of sponsors. The Program Coordinator will reject all proposals that put the organization at risk including illegal activities, gambling,

strip clubs, and bachelor parties. Events with randoms other than family members and significant others are excluded from receiving subsidies.

High Priority	Other Desirable Traits	Exclusionary Characteristics
<ul style="list-style-type: none"> • Annual Events (e.g. Summer Picnics, Regional Alumni Weekends, etc) • Pledge class reunions • Regularly scheduled events (e.g. monthly/quarterly dinners/drinks or other meetups) • Large open events 	<ul style="list-style-type: none"> • Diversity of family and brothers-only events • Types of events in portfolio • Geographical diversity • Large number of sponsoring brothers • Age range of sponsors in portfolio • Reliability of sponsors 	<ul style="list-style-type: none"> • Illegal activities • Gambling • Liability risks • Strip clubs • Bachelor parties • Events with randoms invited

EVENT FUNDING LIMITS

The APRES Ski Program is designed to help shift the financial risk associated with holding events from individual brothers to the Alumni chapter. A tiered allocation structure has been developed to help prioritize the distribution of funds towards events with larger upfront costs that must be covered by the Sponsors. This tiered format is summarized in the table below. Alternatively, the requested amount maximums can be determined using the Funding Worksheet.

Tier	Event Traits	Event Capacity	Per Sponsor Maximum	Event Maximum
Tier 1	Large Upfront costs	16+	\$100	\$1000
Tier 2	Moderate-sized Capacity-limited Upfront costs	6-15 people	\$50	\$750
Tier 3	Small Capacity-limited Upfront costs	2-5 people	\$25	\$125
Tier 4	No upfront costs	2+	\$25	\$500

FUNDING WORKSHEET

Applicants can use the funding worksheet to determine the Event Tier and associated per Sponsor and per Event maximum request amounts. Event Tiers are determined by the need to cover upfront costs by the Sponsors and the maximum event capacity. The Number of Sponsors is used to quantify the appetite for the program within the local community, and consequently event allocations increase with the number of Sponsors up to an event maximum. Primary Sponsors are encouraged to seek out other Brothers willing to Sponsor the event and commit to attending at the application stage to

increase the subsidy amount for the event. The Program Coordinator will also use this worksheet to determine allowable subsidy amounts.

Step 1. Does your event have any upfront costs (e.g. facility reservation fees, food purchases, transportation reservations, etc.) that must be covered by the event Sponsors prior to the event?		
No	→	Your event is Tier 4 with a \$25/Sponsor limit and event maximum of \$500. Go to Step 4.
Yes	→	Go to Step 2. Your event will fall into Tiers 1, 2, or 3. Be prepared to describe how subsidy will be used to cover up front costs for Tiers 1 and 2.
Step 2. Is your event a Pledge Class Reunion with making all attempts possible to include all known class members?		
Yes	→	Your event is Tier 1 allowing up to \$100/Sponsor with a \$1,000 per event maximum. Go to Step 4.
No	→	Go to Step 3.
Step 3. What is the maximum capacity of your event (e.g. at what point will you be forced to turn away interested participants)?		
16 or more people	→	Your event is Tier 1 allowing up to \$100/Sponsor with a \$1,000 per event maximum. Go to Step 4.
6 to 15 people	→	Your event is Tier 2 allowing up to \$50/Sponsor with a \$750 per event maximum. Go to Step 4.
2 Brothers to 5 people	→	Your event is Tier 3 allowing up to \$25/Sponsor with a \$125 per event maximum. Go to Step 4.
Step 4. Compute maximum allowed subsidy amount.		
Enter the Number of Sponsors Listed on the Application.	(N)	_____
Enter the Per Sponsor Allocation for your event Tier.	(S)	_____
Multiply (N) x (S)	(NS)	_____
Enter the Per Event Maximum for your event Tier.	(M)	_____
Enter the minimum of (NS) and (M). This is the maximum amount you can request.	(RA)	_____

SPONSOR DUTIES

Sponsors are responsible for all activities related to the planning, organization, advertising, and execution of the event. Within four weeks after the event occurs, Sponsors must also provide an event summary report including photos from the event. Sponsors who fail to fulfill their duties may be prohibited from receiving further subsidies under this program.

Sponsor Duties are as follows:

- *Planning.* Sponsors are expected to determine the type of event that is to be held, fill out the application, define the event activities, identify facilities to hold the event, make any and all required reservations, and secure all items that must be purchased before the event.
- *Organization.* Sponsors are the focal points for the event. Sponsors are to identify tasks that must be completed prior to, during, and following the event. Sponsors may delegate tasks to other people, but ultimately the Sponsors are responsible for the success of the event.
- *Advertising.* All events are to be advertised the Alumni membership at least two weeks prior to the event. Sponsors are required to create an event announcement listing the date, location, event description, and contact info for the primary Point(s) of Contact. Events are to be listed on the NY Sigma ΦΚΘ Facebook and Chapter webpages, posted to the NY Sigma ΦΚΘ alumni email list, and advertised through any other means desired by the Sponsors, including regional email lists and word-of-mouth. The Program Coordinator, or a delegated representative, may help Sponsors through this process.
- *Execution.* Sponsors are expected to coordinate and hold the event. Sponsors must complete all activities required to make the event successful. If an event is cancelled or postponed, Sponsors are responsible for informing the Alumni base through available electronic means. All Sponsors are expected to attend the event, although exceptions will be made for extenuating circumstances.
- *Event Report.* The Board of Trustees requires an Event Summary Report to document the success of the program. Sponsors are expected to compile a list of all Brothers attending, estimate total number of attendees, provide a brief write up of the event, and submit a few pictures of Brothers and/or their families enjoying the event. Event Reports are to be sent to the APRES Ski Program Coordinator within 4 weeks of the event conclusion.

AWARD NOTIFICATION

The APRES SKI Program Coordinator will notify all Primary and Secondary Sponsors of award status and award amount in a written email no later than the start of the Program Distribution Period for proposals submitted during the standard pre-distribution submission period. Notification will be provided no later than two weeks after application submission for proposals submitted during rolling application periods. Only Sponsors who receive a Notice of Award will receive funds, and only up to the amount noted in the Notice of Award. The Program Coordinator cannot reduce the awarded amounts after a Notice of Award has been issued unless an amended proposal changes the nature of the event.

AWARD PAYMENTS

Sponsors are required to collect and submit receipts to the Alumni Treasurer and APRES Ski Coordinator in order to receive the awarded funds. The Alumni Treasurer will send reimbursement checks to the Primary Sponsor up to the granted subsidy amount for the event within 4 weeks of receiving receipts. Costs not accounted for in receipts will not be reimbursed. Sponsors can submit multiple sets of receipts if necessary: one for costs incurred well before the event (e.g. facility rental or reservation fees) and a subsequent submission for costs incurred closer to the event.

AMENDED APPLICATIONS

There may be reasons for applicants to amend their proposals, including changing the nature of the event or adding new Sponsors. Applicants can send amended applications at any time up to the distribution period application due dates. In this instance, the amended proposal will replace the initial proposal.

Amended proposals submitted after a distribution period application due date will be considered on a funds available basis. If the nature of the proposal remains the same, any funds already awarded will remain allocated unless the number of Sponsors decreases. The most likely reason to submit an amended proposal after the due date is to add new Sponsors to justify an increase in the awarded amount if additional funds are available.

PROGRAM OVERSIGHT

The Alumni VP – Development, as the Program Coordinator, is responsible for executing the APRES Ski program. The Alumni VP – Alumni serves as the Vice-Coordinator for the program.

ELIGIBILITY

Alumni in good financial standing with the Alumni and Active chapters are eligible to apply for an event subsidy. Brothers without outstanding debts to NY Sigma ΦΚΘ must resolve those debts before applications will be considered. Brothers that the APRES Ski Committee concludes to have attempted to defraud the program will also be ineligible.

FRAUD DETERMINATIONS

The Trustees expect all Alumni to utilize this program in good faith to create events that enrich the community as a whole. However, the opportunity for individuals to deceptively exploit this program for personal gain exists. The APRES Ski committee will take all allegations of efforts to defraud the program seriously. Submitting false receipts, applying funds for personal expenses not event associated, or any other act that clearly can be constituted as misappropriation of funds will be investigated. Brothers proven to have defrauded the program will be prohibited from securing future funding.