

University of California, Merced

Expansion Process for Fraternity Organizations

I. Overview

The University of California, Merced chooses to intentionally and carefully manage the growth and expansion of fraternity/sorority organizations. UC Merced seeks to host organizations that will partner to create a 21st century fraternity and sorority community, as demonstrated by ideals consistent with those of the University, and a willingness to commit the human and financial resources necessary to assure achievement of those ideals.

The following process has been created to facilitate the expansion of organizations that further the ideals of the fraternity and sorority community at the University of California, Merced. The expansion process serves to ensure that petitioning fraternities and sororities become successful contributors to the missions of the University of California, Merced, the fraternity and sorority community, and its respective organizations. Further, this document is designed to educate interested University of California, Merced students and inter/national fraternity and sororities of the procedures necessary to become affiliated as a colony or organization at the University. The University of California, Merced in partnership with the Fraternity and Sorority Council, reserves the right, at any time and at its sole discretion, to alter, amend, change, modify, delete, revise, or restate the terms of this expansion process and may do so without providing advance notice to any applying organization, or any other council or organizations.

The Office of Fraternity and Sorority Life Expansion Operating Procedure applies to: 1) UCM students requesting to bring any inter/national fraternity or sorority to the UCM campus or, 2) inter/national fraternity or sorority headquarters who seek recognition at UCM. Local fraternities and sororities may not expand on UCM. *The University operates with an assumption of non-expansion unless a need has been determined to change this assumption. Students and/or inter/national organizations must contact the Office of Fraternity and Sorority Life to determine the institution's current status regarding when expansion will be allowed before initiating any expansion efforts.*

The subsequent information will guide the expansion procedures for inter/national fraternities and sororities at the University of California, Merced. The expansion process is a collaborative process between the University of California, Merced, the Office of Fraternity and Sorority Life, and the Fraternity and Sorority Council. Policies and procedures for each entity must be followed by students and inter/national organizations.

The Expansion Operating Procedure is separated into five sections: Overview, Definitions and Expectations, Application Prerequisites, Application Requirements, and Process. The Definitions and Expectations section describes what the University of California, Merced considers an "inter/national" organization along with expectations for interested organizations and/or interest groups. The Application Prerequisites section explains the qualifications inter/national organizations must meet at the time of application for expansion. The Application Requirements list the materials that must be submitted with the Expansion Application and the Process section outlines the procedure organizations will undergo in order to be approved for expansion at the University of California, Merced.

II. Definitions and Expectations

The United States Department of Education has established guidelines and criteria necessary to be classified as a general sorority or fraternity. Based on the criteria established by the Department of Education, the University of California, Merced classifies general sororities and fraternities as organizations that:

- Do not limit membership to persons pursuing or having interest in a particular field of study, profession or academic discipline
- Do not serve as honorary societies for academic, leadership, or any other endeavor
- Do not permit members to hold membership in other general sororities or fraternities

In order to be eligible for expansion at the University of California, Merced, interested organizations must be inter/national fraternities and sororities. The University of California, Merced defines a "inter/national" fraternity or sorority in the following terms: the organization has a headquarters or office space and staff; has non-profit status with the Internal Revenue Service; has a Board of Directors with a regional structure component as well as

governance documents; has proof of general commercial liability insurance policy with a minimum of one million dollars in coverage; and has regional and national structure of meetings or conventions.

The term “interest group” is defined as a group of current UCM students who are joined together for the sole purpose of and are committed to starting a *particular* inter/national organization at the UCM campus. Interest groups must have documented support and backing from the particular inter/national organization and interest group members must be part of the colony phase of the organization.

General Expectations

- Inter/national fraternities and sororities may establish recognized chapters and colonies at the University of California, Merced only through formal invitation extended by the University.
- Unless invited in the formal expansion process, no inter/national organization may approach students about starting an interest group. Interest groups must be grassroots movements initiated by students.
- There will be no unauthorized expansion activities such as “campus crashing”, “ghost lines”, recruiting or soliciting membership, pre-initiation activities, pledging, educating and/or initiating UCM students without having approved recognition as a colony through the Office of Fraternity and Sorority Life and the FSC.
- Submitted application materials will include only valid and complete documents.
- Interested students and/or inter/national organization representatives may request a meeting with the Coordinator for Fraternity and Sorority Life to discuss the expansion process.

Expectations for Interest Groups

- Interest groups will respect the prohibition against solicitation by inter/national organizations and understand that they are responsible for initiating contact with any inter/national organization.
- Interest groups must contact the Office of Fraternity and Sorority Life to discuss the expansion process and expectations for said groups.
- Interest groups may not use any Greek letters as part of their name unless it is required by the national organization and in that case, the interest group should be represented as the “Interested Men/Women of”.
- Interest groups must not be considered a colony or have a charter from a national organization during the interest group period.
- Initiation or education specific to new members of the organization must not occur with the interest group members. Both constitute as a violation of the expansion policy and subjects the inter/national organization to a minimum of two years of ineligibility to expand at UCM.
- Interest groups should review and become familiar with the policies and procedures outlined for fraternities and sororities at UCM.
- All members of the interest group must be University of California, Merced campus students.
- The following minimum number of members for interest groups is required for the Office of Fraternity and Sorority Life to consider expansion:
 - National Interfraternity Council: 20 members
 - National Pan-Hellenic Council: 10 members
 - National Panhellenic Council: 40 members
 - National Association of Latino Fraternal Organizations: 10 members
 - National APIA Panhellenic Association: 15 members
 - National Multicultural Greek Council: 15
- Any interest groups must have documented support and backing of a(n) inter/national organization.
- Interest groups may not hold events or use university resources to conduct business.
- A minimum 2.5 cumulative grade point average is required for any members of interest groups as that is the requirement for membership in the Fraternity and Sorority Community.

Full compliance with any conditions, stipulations, or restrictions placed upon interest groups is expected. Any action of the interest group and/or behavior of members during the interest group period will be considered in the expansion application and presentation process.

Unfortunately, interest groups may not apply for student organization recognition as this is in violation of federal law. Single-sex organizations other than fraternities and sororities violate the Federal Title IX regulation, which prohibits the establishment of organizations that discriminate based on sex.

Application of Expectations

These expectations apply to new organizations as well as those that have been previously recognized at the University of California, Merced, but have since departed. Organizations previously recognized at the University must refer to the re-recognition expectation established by the institution and the organization prior to the departure of the chapter if one exists. Failure to meet these expectations will result in the organization's inability to be considered for recognition at the University of California, Merced.

III. Application Prerequisites

In order to submit an application for expansion to the University of California, Merced, interested organizations must meet the following requirements:

1. Be a inter/national as defined by the University of California, Merced
2. 501(c)(7) or similar tax status by the Internal Revenue Service
3. General commercial liability insurance policy with a minimum of one million dollars in coverage
4. Have established policies in the following areas: recruitment/intake, membership education, anti-hazing, non-discrimination, and risk management

Exceptions may be granted for multicultural or special interest fraternity/sorority organizations who do not meet the UC Merced inter/national organization definition but have attempted to participate in past expansion processes at UC Merced or have an approved petition letter sent to the Assistant Vice Chancellor for Student Affairs.

IV. Application Requirements

1. University of California, Merced Online Application for Expansion
2. A letter on behalf of the inter/national organization expressing reasons for wanting to expand at the University of California, Merced and a statement of commitment agreeing to the following University policies and guidelines:
 - Alignment with the University of California, Merced Principles of Community, the four pillars of Fraternity and Sorority Life at UCM, and the four aspirational goals of the Division of Student Affairs (Transformational, impact, nimble, and inclusive)
 - Adherence to the University of California, Merced Greek Initiative requirements and agreement that the colony will meet the minimum standards outlined in this document prior to chartering.
 - Compliance with all University of California, Merced policies and guidelines.
 - General support for and compliance with the Constitution, Bylaws, and any other rules of the Fraternity and Sorority Council
 - Agreement to complete the prospective colonization process and charter the chapter within an eighteen-month timeline from the date the colony period begins. *Failure of the colony to charter at the end of this period will result in loss of recognition by the University. The organization will then need to repeat the application process when the University is open for expansion if it wishes to return to the campus.*
 - Confirmation that the chapter being established will be supported by a local advisory board consisting of at least 4 advisors (suggested advisors are Financial, Recruitment/Intake, Faculty, and General Chapter advisor) by the time colony period begins.
3. General information regarding the inter/national organization including: history, a description of the organization's founding values and principles, number of collegiate chapters nationwide, locations of chapters in the state of California and in the Southwest, average chapter size nationwide, the inter/national organization's Statement of Purpose, expectations of members and a copy of the organization's governance structure.
4. Verification that a copy of the certificate of insurance for the inter/national organization's general liability policy with a minimum of one million dollars in coverage will be shared upon colonization.

5. Verification that a copy of the organization's 501(c)(7)-tax status certificate from the Internal Revenue Service will be shared upon colonization.
6. Copies of the following organization policies: general membership standards, scholarship, recruitment, membership education, hazing, discrimination, and risk management.
7. Demographics of alumni/ae within a 100-mile radius of the University (please note that a list of said alumni/ae may be requested prior to the presentation taking place if one is granted).
8. Letter confirming the support for an undergraduate chapter by alumni/ae and/or alumni/ae association located in the central valley or northern California area.
9. A developed timeline outlining how potential members will be sought out/recruited and membership growth plans.
10. A developed colony period timeline outlining necessary details for how the colony will attain its charter at the institution within the required eighteen month timeline.
11. Information regarding the five most recent expansion efforts (including the chapter's current status). *Please note the institutions may be contacted prior to the organization expanding to UCM.*
12. List of institutions where the organization received any disciplinary sanctions and an overview of legal action brought against the national organization within the last 5 years, the nature of the infraction(s), and an overview of how the national organization responded to the situation(s).
13. Requirements and procedures for establishing a new chapter.
14. An overview and/or outline of the new member education program/intake process, leadership development programs, scholarship programs and initiatives, officer development programs, and general membership development programs.
15. Financial support available to the colony, including a statement concerning how, and if, the national organization will handle any outstanding liabilities or other legal responsibilities incurred by the colony, in the event they are not successful in their attempt to become a chapter.
16. National policies applicable to undergraduate colonies and chapters.
17. An overview of the leadership development opportunities available to members within the region (if applicable).
18. An overview of the support provided to the chapter once the charter has been attained.
19. *For organizations with interest groups only:* List of students who are interested and committed to bringing the organization to campus including email, telephone, and university identification number.
20. *For organizations with interest groups only:* the interest group must submit a letter detailing the following:
 - Why they are interested in starting a new fraternity or sorority
 - Efforts the students have made to assess the need for a new chapter
 - Goals for forming a new chapter and why they would not be able to accomplish these goals through a group that is already recognized
 - Vision for their involvement within and impact to the UCM Fraternity and Sorority Community

V. Process

Any interested inter/national fraternities and sororities wishing to expand at the University of California, Merced shall provide the information and materials listed under Application Requirements to the Office of Fraternity and Sorority Life through the online form by the due date list in the expansion timeline. Failure to provide said information shall exclude such organization from consideration for expansion. After the application due date the Coordinator of Fraternity and Sorority Life will convene the Expansion Committee and a formal review of the documents will begin.

Determining the Need to Expand

1. The Fraternity and Sorority Council in conjunction with the University will evaluate the need to open for expansion based on the following reasons:
 - a. Undergraduate enrollment
 - b. Future campus growth plans
 - c. Number of recognized fraternity/sorority organizations on campus
 - d. Number of men/women involved in fraternity/sorority organizations
 - e. Number of men/women registered for fraternity/sorority recruitment

- f. Number of men/women who accept bids during fraternity/sorority recruitment
 - g. Membership retention rates of recognized fraternity/sorority organizations
 - h. Perceived room for growth of a new fraternity/sorority organization
 - i. Availability of campus resources and personnel to support additional fraternity/sorority organizations
2. Following this review the Fraternity and Sorority Council, a simple majority vote of all chapter delegates will approve the initiation of the expansion process.
 - a. The FSC may vote on a one-year or multi-year expansion timeline.
 - b. If the FSC votes on a multi-year expansion timeline, the expansion committee will review the status of the Fraternity and Sorority Community annually and reserves the right to modify the timeline up to two years if deemed necessary.

Expansion Committee

The Expansion Committee shall be convened after the Fraternity and Sorority Council votes to open up the expansion process.

The duties of the Expansion Committee shall be to:

1. Review submitted materials.
2. Invite group(s) explore student interest on campus.
3. Invite group(s) to make on-campus presentations to Fraternity and Sorority Community and University officials.

The membership of the Expansion Committee shall be the:

1. FSC President
2. FSC Executive Vice President of Fraternities
3. FSC Fraternity Delegate
4. FSC Sorority Delegate
5. Office of Student Life, Fraternity and Sorority Intern
6. One alumnus/a of the University
7. One non-affiliated student
8. Assistant Vice Chancellor for Student Affairs (Non-Voting)
9. Coordinator for Fraternity and Sorority Life (Non-Voting)

Expansion Process and Procedures

If the council opens for expansion, the expansion period will be determined by a subsequent vote. The Office of Fraternity and Sorority Life will stop accepting expansion packets at the end of the predetermined period. All packets submitted after the expansion period has closed will be considered during the next expansion period at the inter/national organization's request. In the event an expansion packet is already on record with the Office of Fraternity and Sorority Life when a new expansion period opens and it meets all application requirements, a letter will be sent to the inter/national organization advising that the expansion period has begun. At that time, the inter/national organization is requested to submit a general letter of interest, amendments to the original expansion packet, and any additional materials needed to meet the Expansion Committee's criteria for that particular expansion period.

Once the expansion period is closed, the Expansion Committee will review all packets submitted and a set of criteria will be set for determining which groups receive an invitation to present. The Expansion Committee will make a determination as to how many interested inter/national fraternities or sororities should be invited for campus exploration and a campus presentation and what the final selection criteria will be. Once selected, invitations will be sent to these organizations along with the presentation topics and the criteria. Expansion presentations will be scheduled only during the approved timeline and will be open to the general public.

Following the presentation of the invited inter/national organizations, the Fraternity and Sorority Council will vote on a recommendation for which organizations to invite to form a colony and a hierarchical order of preference for which inter/national organization to invite to become a colony. The Fraternity and Sorority Coordinator will be present during each presentation and will provide additional feedback and a recommendation as to whether a group should be allowed to expand or not at UCM. Both recommendations will be sent to the Assistant Vice Chancellor for Student Life who will make final decisions on invitation and timeline and will send out colonization invitations.

Inter/national organizations and student representatives will be notified of their expansion status at UCM within three weeks of the last scheduled presentation. Organizations not selected will receive feedback as to why they were not selected and must reapply in order to be considered by the Expansion Committee in any future expansion endeavors.

All inter/national organizations that are selected will be required to sign a Memorandum of Understanding.

Expansion Decision Appeal Process

In the event an inter/national organization would like to appeal the decision made regarding their expansion, a written request should be submitted to the Vice Chancellor for Student Affairs and copied to the Office of Fraternity & Sorority Life after the organization is notified of the initial decision made. Appeal requests must be made within five business days of the date of notification of the expansion decision. The request letter must state the reason(s) for appeal, the supporting facts, and the recommended way to correct the alleged error, and must include the Original Expansion Application and supporting documents submitted to the Expansion Committee. Appeal considerations are limited to:

- Failure to follow procedure as defined by the Expansion Operating Procedure.
- Demonstrative prejudice or bias against the organization by a person(s) presiding over or serving as a member of the Expansion Committee. Such prejudice must be evidenced by a conflict of interest, bias, pressure, or influence that precluded a fair and impartial vote.
- New information that was not available at the time of the original vote.

Upon receiving the request, the Vice Chancellor for Student Affairs may ask the Assistant Vice Chancellor for Student Affairs, the Fraternity and Sorority Council, and/or the Coordinator of Fraternity and Sorority Life for the following documentation:

- Minutes from the meeting where the expansion recommendations were made.
- A statement of reasoning or rationale describing the expansion decision.
- A copy of all expansion procedures, processes, council constitution or other applicable governing documents.

If determined necessary, appeal meetings will be scheduled within fifteen business days of receiving the written request for appeal and will involve a maximum of three undergraduate and two alumni/alumnae/graduate representatives of the petitioning organization, the Coordinator of Fraternity and Sorority Life, the Assistant Vice Chancellor for Student Affairs, and the Vice Chancellor for Student Affairs.

The Vice Chancellor for Student Affairs may affirm, modify or reverse the decision regarding expansion. In a decision to affirm the decision, the inter/national organization will be eligible to participate in the next expansion process of the council the organization is eligible to join. In a decision to modify the decision, the eligibility of the inter/national organization will be dictated by the modifications. All decisions will be communicated in writing within fifteen business days of an appeal hearing to the undergraduate and alumni/alumnae/graduate designee representing the organization, the president of the Fraternity and Sorority Council, the Assistant Vice Chancellor for Student Affairs, and the Coordinator for Fraternity & Sorority Life. This time limit may be extended as necessary for consideration of the record on appeal. All appeal decisions are final.

On appeal, the burden of proof rests with the petitioning inter/national organization to clearly show that an error has occurred during the expansion process. During the appellate process the organization's status will remain unchanged. In the event the decision is overturned, the inter/national organization(s) will be required to sign a Memorandum of Understanding.

Expansion Timeline

Phase 1 (Pre-Campus):

Friday, January 22, 2016: Expansion Opens: Widespread notification to fraternity organizations that expansion is open.

Monday, February 7th, 2016 – Friday, February 19, 2016: Interested organizations can arrange for site visits with the Coordinator for Fraternity and Sorority Life. (**Note:** No student contact may be made during these visits.)

Friday, February 26, 2016: Expansion Application Due.

Monday February 29, 2016 - Tuesday March 15, 2016: Review of Applications by Fraternity and Sorority Council delegates to select potential groups for Phase 2.

Friday March 18, 2016: Selected organizations invited to come to campus to explore interest from student body.

Phase 2 (On-Campus and Presentations):

Monday, April 4, 2016 – Friday, April 15, 2016: Selected organizations on campus to explore interest from student body. This will be done through tabling and career fair type events in conjunction with current active chapters.

Monday, April 18, 2015 – Friday, April 22, 2015: Expansion Presentations to Fraternity and Sorority Community (must show student interested as outlined in the interest group section of the FSL Expansion Procedures).

Tuesday, April 26, 2015: Fraternity and Sorority Council votes and presents recommendations to the AVC for Student Affairs. AVC for Student Affairs makes final decisions.

Friday, May 13, 2015: Colonization Invitations distributed to interested inter/national organizations.

During the two campus reviews, the Coordinator for Fraternity and Sorority Life will review the colonies progress with the chapter, alumni/ae, inter/national staff and make a recommendation to the Assistant Vice Chancellor for Student Affairs. The AVC for Student Affairs can determine to end the colonization during either of the two campus review periods.