

University of Alberta Campus Chapter Program

Starting a Chapter Handbook

The Alumni Association

The Alumni Association was founded in 1915 by a group of keen alumni volunteers eager to stay connected with each other. For 100 years the Alumni Association has enjoyed a tradition of service to the alumni community and to the University of Alberta. All graduates of a University of Alberta degree program automatically become members of the Alumni Association.

The Alumni Association is a key stakeholder and partner that contributes to the success of the university. Alumni Council consults with the Office of Alumni Relations to create a strategic plan for alumni relations for the university.

Funds to support the Alumni Association are from its revenue-generating programs, such as degree frame sales, the alumni travel program and affinity partnerships with various companies offering alumni benefits such as insurance.

Because the Alumni Association is part of the university, all legal agreements on behalf of and for the benefit of university alumni are entered into by and in the name of the university.

Alumni Council

The Alumni Association is led by a volunteer advisory council, which has a formal point of connection to the president of the university. Alumni Council represents the body of more than 270,000 University of Alberta graduates who make up the Alumni Association. Alumni Council provides advice, determines programming and works closely with the University of Alberta to strengthen the relationship alumni have with their alma mater and with each other.

Alumni Council is composed of:

- One representative from each of the 17 degree-granting faculties
- Currently 18 members-at-large
- The president, president-elect and past-president of the Alumni Association
- Two representatives each for the Board of Governors and the Senate
- The president of the Students' Union or their designate
- The president of the Graduate Students' Association or their designate
- The associate vice-president (Alumni Relations)
- The vice-president (Advancement)
- The honorary president (the university president)

Vision

A proud and inspired community of alumni and students, positively influencing the success of the university.

Mission

To engage university alumni and students in building the success of one of the world's great universities for the public good by positively extending the university experience beyond graduation.

Promise

The Alumni Association promises to provide alumni with a sense of community and belonging for the purpose of keeping them emotionally connected and actively engaged with the University throughout their lives.

Values

- Connection
- Community
- Pride
- Integrity
- Diversity
- Citizenship
- Leadership
- Innovation
- Service

Alumni Engagement Programming

The Alumni Association facilitates outreach to 45,000 alumni and guests through volunteer activities, special events, educational programming, family events and social gatherings. Alumni Association programming includes:

Affinity & Benefits – University of Alberta alumni have access to exclusive benefits through affinity partnerships and other discounts. Affinity partnerships offer a three-way benefit: the partner receives exclusive access to the alumni population, alumni receive discounted rates, and the U of A receives revenue. Proceeds generated through these relationships are used to fund alumni engagement programming. Revenue is also generated through U of A branded degree frame sales and the alumni travel program. The Alumni ONEcard provides alumni library access, discounts at campus recreation facilities, and a 10% discount at the U of A Bookstore. Other benefits are available to alumni such as discounts on Broadway tickets.

Alumni Awards - More than 150 nominations are received annually for the awards program and over 40 individuals are recognized. Award Categories are: Distinguished Alumni Award, Honour Award, Award of Excellence, Horizon Award, Sports Wall of Fame, Centenary Award, Alumni Innovation Award and Lois Hole Student Spirit Award. A ceremony is held each year at the start of Alumni Weekend. Approximately 1,000 guests attend the event.

Alumni Travel Program – The University of Alberta's alumni travel program is designed for alumni, their family and friends. Over thirty high-end tours are offered each year and provide a source of revenue, prospect identification and cultivation for the Alumni Association. These trips are offered to alumni groups across North America and have a higher-than-average educational component to them.

Alumni Weekend - Held on campus each fall, this award-winning event is the biggest annual gathering of alumni. More than 9,000 alumni and guests are involved in multiple events planned by the Office of Alumni Relations and the faculties. Alumni Relations coordinates recruitment of class organizers, promotion, registration, as well as many of the major events (Alumni Awards, Golden Grads Dinner and more).

Corporate Alumni Relations – An initiative to connect with alumni through their workplaces and professional affiliations. By partnering with employers, the Alumni Association can deliver relevant professional development and career advancement opportunities. Some programs in development include: networking events, job-shadow days and industry-specific speakers.

Edmonton Programs - The Educated Series offers participants opportunities to participate in educational workshops, classes and outings featuring faculty and alumni experts. Recent sessions include food tastings, backstage views of music, theatre and dance productions, large-scale lectures as well as luncheon lectures from university faculty. About 2,000 participants are involved annually in educational programs. The Alumni Association hosts popular family-oriented events such as the popular Easter Eggstravaganza. There is an annual Alumni Memorial Service to commemorate alumni and students who have passed away.

Faculty Engagement - The Faculty Engagement portfolio works directly with the faculties to develop initiatives and events to support the faculties in achieving their alumni relations goals. With an emphasis on communication and identifying opportunities for collaboration, the programming is developed and executed to target the alumni within the faculty and further the alumni engagement goals of the faculty.

Regional Chapters - Regional chapters connect alumni living outside of Edmonton to the University of Alberta through presentations on cutting-edge research and volunteer-led social activities. There are 150 volunteer contacts worldwide in 35 centres, organized into Alberta, Canada, US and international groups.

Student Engagement - The Alumni Association welcomes its future members from the minute they begin their post-secondary studies. In September, the Alumni Association supports a number of orientation and welcome events for new students. Throughout the year, students benefit from the Alumni Association's free student engagement events and programs including movie nights, lectures and a granting program that contributes up to \$30,000 to events organized by and for students. When students graduate, the Alumni Association marks their formal entry into the Alumni Association with an induction at convocation and a welcome email outlining the benefits of being U of A alumni.

Venture Mentoring Service – The Venture Mentoring Service is a program that provides mentorship to student and alumni entrepreneurs. Based on a program developed at MIT, the mentorship is team-based (several mentors to each entrepreneur) and focused on the long-term development of the entrepreneur.

Volunteer Program – Alumni are offered opportunities to contribute to the life of the university in areas such as alumni programming, student recruitment, mentoring and community service.

The Campus Chapters Program

A campus chapter (or chapter) is a group of volunteers who share a common experience and who want to connect with the university and each other. During your time in university, you probably met a lot of people who made your student experience special. Some of these people were in your program of study or your faculty or department, or maybe in a student club or residence. Starting a chapter is a way to stay connected with your special group of friends, meet new people and stay connected to the university in a way that is meaningful to you.

In general, chapters help promote the interests and welfare of a particular group and provide overall support for the University of Alberta. Chapters support communication between the university and alumni groups, and provide networking, educational and social opportunities for their members

Some of our chapters include:

- Dentistry Alumni Association
- Dental Hygiene Alumni Chapter
- Gateway Student Newspaper Alumni Association
- Ismaili Alumni Chapter
- Library and Information Sciences Alumni Association
- Lister Hall Alumni Chapter
- Mixed Chorus Alumni Association
- Pharmacy Alumni Association
- School of Public Health Alumni Chapter

Chapter Activities

Each chapter is unique in its interests and goals, but most plan activities that appeal to their alumni members. Some common activities include:

Social Events: Most alumni want to get together in a social setting so they can get to know each other better. Having fun or casual gatherings help to solidify the membership. Examples of some common social events are pub nights, wine tastings, skating parties, barbecues or attending a university sports game.

Student Events: Our alumni love to support and connect with today's students. It's a reminder that university involvement doesn't have to stop at graduation and is a way to improve the student experience. Some examples of student events are: hosting a portion of a student orientation for your faculty or department, hosting a student pub night or barbecue, hosting a convocation celebration, hosting study breaks during exam times, providing incoming or outgoing students with gifts, and hosting mentoring and networking activities.

Special Events: Capitalize on the unique interests of your chapter. If you are an arts group, then attend a related event in the community. Perhaps your faculty or department has public lectures you could promote and enhance. Whatever your connection to campus, try to find a way to use those interests in your chapters programming. For example, the Mixed Chorus Alumni Association hosts a reception at a performance of the student chorus, the Dental Alumni Association hosts a reception at a major dentistry conference and the Library and Information Sciences Alumni Association recognizes an 'alumnus of the year' with a donation to a special library collection.

Reunions: Each year the Alumni Association hosts Alumni Weekend, a major series of events over four days that brings thousands of alumni back to campus. Many chapters capitalize on the celebration to host a reunion. Some also provide special gifts to alumni who are celebrating a special anniversary. Some reunion events are: a tour of new facilities, a reception, a dinner, a wine and cheese party, a patio party, a barbecue, or an afternoon tea.

Fundraising: Many of our chapters have endowed bursaries and scholarships for our students and have undertaken fundraising campaigns to create other endowments for special purposes. Be sure to check with a Campus Chapter Program staff member before soliciting any money – we can offer assistance and guidance to ensure success.

Mentorship: Our students gain so much from learning from our alumni who are already practicing in their chosen field. It can help guide their studies and is very rewarding for the alumnus as well. The Business Alumni Association and the Pharmacy Alumni Association both have excellent mentoring programs.

Communications: Keeping in touch with your membership is important to a robust and well-supported chapter. Newsletters (by email or in print) are a great way to let your alumni know about the great work you're doing and to update them on happenings on campus. Using social media is also helpful – keep your chapter's Facebook page updated with event information and updates on what your student cohort is doing and consider setting up a LinkedIn group.

Governance

Each chapter is governed by an executive committee comprised of volunteers. The executive committee is ultimately responsible for managing the direction and activities of their chapter. The executive committee sets the number of meetings they need to have to complete the work they've decided on. Much of the work can be done through email and phone communication.

The executive committee may choose to create sub-committees to work on various activities and these sub-committees may consist of volunteers both on and off the executive committee.

The Campus Chapters Program staff members provide some supports to the volunteers on the executive committee. A breakdown of areas where a staff member can support your chapter versus what the chapter executive board is responsible for can be found in the document labelled "Staff Support for Chapters."

All chapters are required to meet the Campus Chapters Program Requirements in order to remain in good standing with the Alumni Association. The requirements can be found in the document labelled "Campus Chapters Program Requirements."

The Alumni Association can withdraw recognition of a chapter if the chapter does not comply with the Campus Chapters Program Requirements, has not demonstrated active progress in the pursuit of its objectives, or is found to be unsupportive of or working against the wishes of its respective faculty, department, or the Alumni Association. Please note, however, it is Alumni Association's wish to support every chapter and help it flourish.

Financial management

The executive committee is responsible for securing funding to execute the activities of the chapter. Funds can be secured through one of the following means:

- Gain financial support from your respective faculty or program
- Apply for funding through the Campus Chapters Activity Assistance Program
- Collect membership dues, solicit funds from your membership or secure corporate sponsorships for specific activities. These fundraising activities must be done in consultation with a Campus Chapter Program staff member to ensure a coordinated fundraising effort with university fundraising activities.
- Hold a fundraiser event. Please note that there are some strict rules that must be followed when dealing with donation appeals and fundraising, so be sure to speak with a Campus Chapters Program staff member before you proceed. One example is that chapters cannot raise funds by participating in casinos or bingos.

A Campus Chapter Program staff member will open an operating account held within the university where your chapter's funds will be held. The staff member is responsible for the administration of the account, completing duties such as paying invoices and reconciling the account monthly to provide an update to the executive. While the staff member makes all possible effort to manage each chapter account in accordance with the wishes of the chapter executive board, ultimately, the university is the owner and controller of the funds in the account.

Alternatively, the financial account for the chapter may be held by the faculty, department program or another university office aligned with a particular chapter.

Starting a new Campus Chapter

A chapter can be formed by a group of alumni from almost any identifiable group that existed on campus. The chapter could be based upon a:

- faculty
- department
- program or specialized area of study
- student club
- any other connection shared by a group of graduates

The purposes of a chapter could include:

- inspire continued interest in the university from the membership
- encourage the best students to attend the U of A
- assist students by raising funds to support their activities or for scholarships
- offer social activities and communications for alumni to stay connected

The right number of members is important for a chapter to thrive and be meaningful. We recommend you have at least 300 people who could potentially be involved. There also needs to be interest from the alumni – we cannot support a chapter unless we know that alumni support the chapter. We also require that the appropriate faculty or department is in support the chapter.

Forming a new chapter is a challenging but rewarding experience that leaves a lasting tradition for your alma mater. As a volunteer, you can draw from these experiences and make valuable, lasting contributions and contacts.

Steps in forming a Campus Chapter

Step 1: Meet with a Campus Chapters Program staff member.

The staff member will discuss your plan and interests, ensure that parameters for success can be met, and provide advice on a plan of action.

Here are some questions to ask yourself before the meeting:

- What is the cohort that this chapter will target?
- Explain the history / background of the cohort.
- Why do you want to start an alumni chapter?
- What do you think would be the purpose of the chapter?
- What are some of the characteristics of your cohort? (Do most of them share a profession, interest, experience, etc.)
- What types of activities is your chapter interested in offering?
- What value do you feel a chapter can bring to your cohort?
- How engaged is this cohort with the university (e.g. student group or faculty programming) or in other ways (e.g. professional association)?

Step 2: Meet with applicable stakeholder groups.

If your chapter is based on a program of study, you should meet with the appropriate party within the faculty or department. It is important that the work of your chapter is aligned with the faculty / department's goals and that they are supportive of your proposed chapter activities. You will need an appropriate staff member within the faculty / department to write a letter of support to include in your application.

Other stakeholder groups you may need to meet with include student associations or clubs, professional associations or other community groups. Discuss with them the purpose, goals and activities to gain their support of your proposed chapter. Chapters are generally more successful when they collaborate with other groups with similar missions to support and enhance, not duplicate, any work already being done to engage their cohort. Letters of support from these groups will strengthen your application.

Step 3: Survey your constituents.

You are required to gain input and feedback on your initial chapter proposal by the cohort you are aiming to engage. A survey template has been created to assist you however you are free to adjust it to suit your needs. Use this data to build your Terms of Reference and for planning purposes. You can also ask for the names and contact info of anyone who is interested in volunteering on the executive committee.

Step 4: Form an initial executive board.

You will need at least five members to form an initial executive committee. Each of the executive committee volunteers should have a job title with a job description which can be refined at a later date. You must assign an interim President / Chair and President-elect / Chair-elect.

Step 5: Create a Terms of Reference.

This is a document that outlines the structure of your chapter. Like a constitution or set of bylaws, they describe the organization's goals and standards of conduct. The document is meant to protect the chapter, outline its responsibilities and provide a working structure. It needs to be general enough to adapt to changing times but also specific enough to define its interests and goals. Please use the template provided.

Step 6: Complete the application form and attach the required supplemental documents.

Send your completed application package to the Campus Chapter Program staff member to review. If there are any issues or concerns, the staff member will work with you to amend or strengthen your application package. Once your application package has been approved by the staff member, it will be sent to Alumni Council to review and vote on at their next meeting.

Step 7: Presentation to Alumni Council

A volunteer from your executive committee should attend the scheduled Alumni Council meeting to present on your proposed chapter. Please use the provided PowerPoint template. At this meeting, Alumni Council will vote on your application.

Step 8: Approval and Next Steps

If your application receives final approval from Alumni Council, you will receive a formal letter notifying you of your official chapter status.

Next, you should book a meeting with a Campus Chapters Program staff member and executive committee. At this meeting there will be some paperwork that will need to be filled out and some training that the staff member will deliver. At this meeting you will make a plan to meet all the requirements such as creating job descriptions, filling vacant executive positions, creating an annual plan, etc. You can book an additional meeting with a staff member who can help facilitate a planning meeting so you can begin delivering programming to your cohort.