



**METHODIST
UNIVERSITY**

**ALUMNI ASSOCIATION
CHAPTER HANDBOOK**

Proposed February 2019

Introductory Letter

Alumni Chapter Presidents and Committee Members,

On behalf of the Methodist University Alumni Association, thank you for your service to your alma mater and to your alumni chapter. Alumni chapters are formed primarily because alumni have a fondness for Methodist University. Alumni also enjoy getting to know other alumni within their community and sharing their experiences and the great Methodist University tradition.

Official alumni chapter affiliation with the Alumni Association comes with many advantages and privileges. This small handbook will help you to better understand our expectations and guide you through the process of starting and maintaining a successful alumni chapter. Again, we thank you for your commitment and look forward to working with you.

Sincerely,

Kirbie Britt Dockery '03

Director of Alumni Affairs & Annual Giving

Diana Doucet Sims '69

President of the Alumni Association

About Us

The Office of Alumni Affairs works with more than 12,000 graduates across the country and the world, helping them stay connected to MU, their classmates and mentors. The Alumni Association aims to help promote the general welfare of Methodist University and to encourage and stimulate the interest of graduates and former students in the University; to strengthen relationships among students, parents, faculty and community; to build spirit and support for the University through communications and events; to provide advice and counsel to the administration and the Board of Trustees; and to assist educational excellence throughout the University.

The Methodist University Alumni Association chapter network is essential in building strong and cohesive communities of alumni across a wide-ranging geographic area and along a broad spectrum of affinities and special interests.

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Chapters are important to MU because they:

- Promote MU within their local community;
- Provide an ongoing connection between alumni and the university through a diverse offering of programs and events;
- Communicate with key audiences on behalf of the university and alumni association, including students, parents, alumni and friends of the university; and
- Provide alumni with opportunities to serve as ambassadors and key volunteer leaders on behalf of the university and Alumni Association.

This handbook offers practical information for partnering with the Alumni Association as you work to grow and lead your chapter. Throughout this guidebook, you will learn about useful information to help start or manage a chapter as well as ideas for achieving success.

All active chapters should be officially registered with the Alumni Association each fiscal year. New chapters may register at any time. When the Alumni Association approves your application, you will need to meet the responsibilities laid out in this guidebook in order to maintain your active status.

While this handbook strives to answer many of your questions, please know that the Alumni Association staff is available to provide support and knowledge to help you along the way.

Alumni Chapters and Benefits

Alumni chapter development is an essential element in helping the Office of Alumni Affairs build and maintain relationships with alumni and friends of Methodist University. These chapters provide alumni with the opportunity for professional and social interaction, and volunteer opportunities that benefit both the University and the individual. Through alumni chapters, graduates from Methodist are able to maintain and develop friendships and associations with other alumni, participate in the ongoing progress and life of the University, and continue to nurture the important education-for-life experience.

There are three types of alumni chapters:

- Geographic Chapters are for alumni and friends of Methodist University in a specific region (Cumberland County, Charlotte Area, New England, etc.).
- Affinity Chapters bring together alumni and friends with a shared common attribute or activity (black alumni, athletic alumni, law alumni, etc.).
- Academic Chapters are comprised of alumni and friends who graduated from a specific academic discipline (music, biology, history, etc.).

Alumni chapters benefit the school, the alumni, and members of the greater Methodist University community by:

- Creating ways for alumni to network and meet each other in their communities.
- Planning and hosting events that strengthen alumni ties to the University.
- Renewing friendships developed at the University.
- Supporting the efforts of the University to keep alumni informed of campus developments.
- Providing avenues for the exchange of ideas between alumni and the University.
- Assisting the University's recruitment and admissions program.
- Involving alumni in career development, and job and internship placement of students and graduates.

Process of Developing Alumni Chapters

Concentrations of alumni are spread throughout the United States and around the world. In some cases, the Office of Alumni Affairs may identify groups of alumni in certain areas that would benefit from an organized alumni chapter. In other situations, alumni may approach the Office of Alumni Affairs with the intention of creating a chapter.

These steps need to be taken to formalize your alumni chapter.

1. For geographic alumni chapters, the first step is defining the region's boundaries. For affinity and academic chapters, the uniting interest must be identified.
2. The second step is to identify a president or co-presidents, most likely a member or members that responded to the call to be on the chapter committee. The selection of the president is not formal and he or she will normally self-identify or be selected by the alumni director and president of the Alumni Association.
3. Next, a chapter registration form must be submitted to the Office of Alumni Affairs for review.
4. The fourth step is to publish an appeal to alumni in that defined region or affinity to serve on the chapter committee. Diversity in this core group ensures event participation from a broader-based alumni body.
5. Then a petition for charter, with no fewer than 10 member signatures, is submitted by the chapter committee to the executive committee of the Alumni Association for approval.
6. Upon approval by the alumni director and the executive committee of the Alumni Association, chapter recognition will be granted.
7. Once chartered, the chapter committee, under the leadership of the chapter president, should set chapter goals. Each chapter shall plan their goals with the assistance of the alumni director.
8. To maintain the status of a chapter, all guidelines within this handbook must be addressed and followed or the chapter may be dissolved by the Alumni Association.

Chapter Organization – President

Each alumni chapter will have a chapter committee led by a chapter president. The president works with the alumni director and he or she will act as the liaison between the alumni chapter and the Alumni Association. There is no term limit for a chapter president provided he or she is actively involved and fulfilling the duties as outlined in this handbook.

The chapter president is responsible for:

- Providing overall leadership and direction.
- Working with the Office of Alumni Affairs to identify and recruit volunteers to serve on the chapter committee.
- Organizing at least one annual strategic planning meeting with the chapter committee members to discuss event ideas for the year ahead.
- Coordinating all chapter events with the Office of Alumni Affairs.
- Ensuring that the alumni chapter holds, at minimum, one signature event per year.
- Attending as many chapter events as possible, especially the annual signature event.
- Confirming that all chapter activities and initiatives are approved by the Office of Alumni Affairs including, but not limited to, events, programs, and newsletters.
- Allowing the Office of Alumni Affairs to publish pre-approved personal contact information on the alumni website.
- Submitting chapter reports to the secretary of the Alumni Association prior to Alumni Association quarterly meetings.
- Attending the Alumni Association quarterly meetings when possible. Attendance is not mandatory, but highly encouraged.
- Ensuring that that the chapter remains active by fulfilling all requirements as defined in this handbook.

Chapter Organization – Chapter Committee

The chapter committee should ideally have a minimum of three members and be comprised of alumni from various ages, interests, and backgrounds. This committee will support the chapter president in the planning and execution of alumni chapter activities and initiatives. Committee member responsibilities range from providing event ideas during the annual strategic planning meeting to taking the lead as an event coordinator for chapter events. The level of involvement will depend on the interest and availability of the volunteers. There is no term limit for chapter committee members as long as they are actively involved and fulfilling the duties outlined in this handbook.

The chapter committee volunteers are responsible for:

- Attending the annual strategic planning meeting organized by the chapter president.
- Assisting the chapter president with the identification and recruitment of other committee members.
- Providing educational, social, and/or service-oriented event ideas to the chapter president.
- Attending as many chapter events as possible, especially the annual signature event.
- Responding to specific requests from the chapter president for assistance in creating, promoting, and executing chapter events and initiatives.
- Educating alumni and friends within the chapter about events and encouraging attendance.
- Using personal communication tools such as social media, email, and phone to contact other alumni and friends about chapter initiatives and events.
- Allowing the Office of Alumni Affairs to publish pre-approved personal contact information on the alumni website.
- Supporting the efforts of the University to keep alumni informed on campus developments.
- Serving as an ambassador of Methodist University.

Alumni Chapter Policies and Benefits

Once officially recognized as an alumni chapter of the Methodist University Alumni Association, chapters must adhere to the following:

1. All materials bearing the chapter's name and/or logo must be approved by the alumni director.
2. Any written or published materials, including information posted on the alumni website or on any online resource affiliated with the University, must first be approved by the alumni director.
3. Any event or initiative with an associated cost must be approved by the alumni director. In some cases, the chapter may receive funding assistance from the Office of Alumni Affairs.

Once officially recognized as an alumni chapter of the Methodist University Alumni Association, chapters are provided with the following:

1. Office of Alumni Affairs staff assistance in planning and implementation of approved and scheduled events as well as chapter materials.
2. Office of Alumni Affairs staff assistance in collecting chapter event reservation information and associated fees.
3. Inclusion in Methodist University Alumni Association publications, both print and online.
4. Access to pre-approved office resources such as our online social media outlets, conference call technology, etc.
5. Event funding support, in some cases. When possible, the Office of Alumni Affairs will help financially support alumni chapters. As a rule, however, chapter events should be planned to break even or be profitable through sponsorships and/or admission fees.
6. Approved distribution lists of alumni relevant to your chapter, when necessary. All records are confidential and are not to be used for any commercial purpose or personal gain.

Alumni Chapter Maintenance Requirements

In order to maintain good standing as an active chapter of the Methodist University Alumni Association, all recognized chapters must adhere to the following:

- **Leadership:** Following the selection of a new president or change in committee membership, the group must report changes to the alumni director.
- **Events:** Each chapter shall hold a minimum of one signature event per year. Prior to scheduling any event, the president should contact the Office of Alumni Affairs to coordinate the proposed date with other alumni activities on the alumni calendar. All events shall be held in a manner consistent with the overall goals and objectives of Methodist University and the Alumni Association.
- **Annual Review and Renewal:** Regardless of the original recognition date, all chapters will come up for review by the executive committee of the Alumni Association at the beginning of the fiscal year (July 1). Should a chapter be unable to adhere to the chapter maintenance requirements, the executive committee may take steps to initiate the chapter suspension/dissolution process.
- **Legal Relationships:** Alumni chapters are recognized entities of the Methodist University Alumni Association. The Alumni Association operates under the auspices of Methodist University, and is subject to the authority thereof.
- **Contracts and Agreements:** Any contract(s) must be entered under the authorization of the alumni director of Methodist University. Questions concerning these matters should be directed to the alumni director.
- **Product Licensing/Methodist University Logos:** All use of the Methodist University seal and logos must be approved by the alumni director.
- **Chapter Payment Criteria:** Monies spent by a chapter for an event or meeting must be approved by the alumni director in advance, prior to expenditure.

Timeline for Chapter Event Planning

10 Weeks Before the Event

- Identify event goals and measurable outcomes
- Select target audience(s) and outreach tactics
- Determine the best format for the event
- Develop the event program

6-8 Weeks Before the Event

- Fill out a Chapter Event Proposal Form to submit to the Office of Alumni Affairs
- Secure event location, catering, etc.
- MU staff will publish in event listings on website and monthly newsletter
- MU staff will help to publicize through social media, e-mail, etc. as needed
- Chapter committee will market the event through individual/personal invitations via e-mail, social media or phone
- MU staff and the chapter committee will collaborate on program preparation or budgetary items

4-6 Weeks Before the Event

- Continue outreach and event marketing
- Mail invitation as necessary and budget allows
- Determine volunteer needs and request help from chapter members

2-4 Weeks Before the Event

- Continue outreach and event marketing

1 Week Before the Event

- Confirm event logistics
- Send reminder to registrants with event details and logistical information

Within 1 Week Following the Event

- Settle all financial obligations and turn in any money collected to the Office of Alumni Affairs
- Fill out a Chapter Event Evaluation Form to submit to the Office of Alumni Affairs
- Send a form of communication to those who attended (ex. e-mail, note, phone call)

Chapter or Club Suspension and Dissolution

The Office of Alumni Affairs, Alumni Association, and its executive committee are committed to assisting all recognized Chapters to be viable and successful. Unfortunately, when chapters are unable to meet the minimum maintenance requirements, they may face suspension or dissolution. The following describes the circumstances and procedures that apply when this situation becomes necessary.

- **Suspension and Dissolution by the Chapter:** A chapter may be suspended if there is no longer an interest or ability by the leadership or its committee members to maintain the chapter. The executive committee of the Alumni Association will acknowledge the suspension when it receives notification from the chapter president of such situation. The executive committee shall then promptly inform the Alumni Association of the chapter's suspension status.

If after one year from the date of suspension the chapter has not been reactivated, then the chapter may be dissolved by majority vote of the Alumni Association or executive committee.

- **Suspension/Dissolution Process:** The executive committee may suspend a chapter if it fails to meet the maintenance requirements as previously outlined. When suspension or dissolution becomes necessary, the following due process will be followed:
 1. A written notification of suspension will be sent to the chapter president by the president of the Alumni Association. This notification shall include a request to participate in a meeting between the executive committee and chapter leadership to discuss the status and/or possible alternatives for the continued viability of the chapter. If an in-person meeting is not possible, then an alternative communication method should be worked out between the executive committee and the chapter leadership.
 2. Depending on the outcome of this meeting, the executive committee will make a recommendation regarding the chapter's ongoing status (continuance, suspension, or dissolution) to the Alumni Association.
 3. If, after one year from the date of suspension, the chapter is not reactivated, then the chapter may be dissolved by the majority vote of the Alumni Association or executive committee.