

# KPU ALUMNI CHAPTERS HANDBOOK



## ALUMNI RELATIONS OFFICE

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*\*In preparing this handbook, we particularly acknowledge using material from the  
University of Alberta Campus Chapters Handbook.*

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# WELCOME TO THE KPUAA CHAPTERS PROGRAM

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## What is the Alumni Association?

The Alumni Association is a volunteer, society and a not-for-profit association. All graduates of Kwantlen College, Kwantlen University College, Kwantlen Polytechnic University, or KPU automatically become lifetime, free members of the Association when they graduate. The Alumni Association works interdependently with the Office of Alumni Relations, paid staff of KPU. The staff receives direction from the Association on priorities and policies and carries out the work of connecting with and offering benefits to all alumni of KPU.

The Alumni Association is governed by elected KPU alumni voted in by the KPUAA members at large. The staff members of the Office of Alumni Relations are led by the Association's Executive Director and the University's Chief Advancement Officer. There is one full time position in the Office of Alumni Relations who works with alumni through the many programs we offer.

Funds to support the Alumni Association are from its affinity partnerships with a corporate partner.

The first group of alumni graduated from Kwantlen in 1981. The Alumni Association was formed in 2008. There are currently over 43,000 alumni of Kwantlen in the world.

## Mission

The Kwantlen Polytechnic University Alumni Association will bring together Kwantlen alumni and help them build lifelong relationships with the university and the community, increasing the institution's reputation and the impact that graduates have on Kwantlen and the world.

## Purpose

KPUAA's primary goal is to provide Kwantlen alumni with valuable programs and services that support their continued success both personally and professionally.

In addition to providing alumni with tangible services and rewards, KPUAA aims to unite alumni in support of important matters and issues that affect the university and the community, including raising awareness about the value of higher education.

## **Alumni Relations Office**

The Office of Alumni Relations carries out programming to help connect and inspire our alumni. Below are some of the main programs offered:

### **Services**

- Networking with fellow Alumni at events
- Online Job Posting System
- Alumni to student Mentorship Program
- Career Services and Support
- Alumni Professional Directory
- Alumni Business Cards for Recent Graduates
- InTouch newsletter is a monthly electronic newsletter that shares information on events and news of interest to our alumni.
- Alumni Chapters Program — offers opportunities for alumni to gather for socializing, networking, or educational purposes anywhere there is a concentration of KPU alumni. It also offers people with specific connections to the University the opportunity to gather, to network and to continue to be involved with the University in certain areas.

### **Rewards**

- Discounted car rental with Enterprise rent-a-car and National Car Rental
- 10% off on Aerocar Service
- 10% off all regularly priced merchandise (excluding text books) at KPU Bookstores
- 25% off room bookings (meeting and conference space) at Kwantlen Campuses
- Discounted commercial printing through Kwantlen Print Services
- Access to KPU Library Resources and Services
- Discounts at KPU's Cloverdale Campus Automotive Shop

## **A. CHAPTERS PROGRAM OVERVIEW**

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An alumni chapter is a group of volunteers who share a connection 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. The chapters program 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. Alumni Chapters create communication between the university and alumni groups, and provide networking, educational and social opportunities for their members

Types of Alumni Chapters may include:

- KPU Alumni Business Chapter
- KPU Alumni Interior Design Chapter
- KPU Alumni Nursing Chapter

### **What do Alumni Chapters do?**

In general, chapter volunteers work together to organize gatherings or events for their alumni. Some chapters may have a broad mission and are very active, while some chapters have a small focus.

### **How do Alumni Chapters operate?**

Chapter volunteers can meet between two and five times per year to discuss what kinds of events or opportunities would interest their alumni. They plan the kind of events, how to fund them, where to hold them and divide up the responsibilities. Chapters can apply for funding assistance from the KPUAA sponsorship fund which allows chapters to receive financial support for events if approved.

### **Financial Support**

The KPUAA sponsorship fund was established to support alumni and groups whose mission aligns with the alumni association's mission to engage our alumni. Applications are reviewed bi-annually in spring and fall. You can submit your application at any time, but the applications will only be reviewed twice a year. The deadline is May 1st and November 1st. Applications are available at [www.kpu.ca/alumni](http://www.kpu.ca/alumni).

The Office of Alumni Relations is here to help. They will assist in the planning process, offer advice on what has worked for other groups and may assist with event logistics and marketing support. Staff also has access to the university's alumni contact database so they can help to send out event invitations. Alumni staff can provide guidance on how to run your chapter and manage your funds if required.

Chapter volunteers have a lot of fun! For most people, attending university was a pivotal experience. We learned so much about who we are and what interests us, not to mention our program of study.

Being a chapter volunteer helps us to reconnect to those powerful times in our lives and gives us the opportunity to share our experience with others. It is great fun to get to meet other alumni who share similar experiences. Serving as a chapter member is a great skill to add to your résumé and there are many valuable networking opportunities.

## **B. HOW TO START A NEW ALUMNI CHAPTER**

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An Alumni Chapter can be formed by a group of alumni from almost any identifiable group that existed at university.

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 an alumni chapter could include:

- offering social activities and communications for alumni to stay connected
- inspiring continued interest in the university from the membership
- assisting students by raising funds to support their activities or for scholarships

The right number of members is important for an alumni chapter to thrive and be meaningful. We recommend you have at least 10 people who could potentially be involved. There also needs to be interest from the alumni — we

will not support a chapter unless we know that alumni support the chapter. We also want the appropriate faculty or department to 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.

Some questions you and other interested alumni should consider:

- What is our purpose? What do we hope to accomplish?
- In what ways will we support the needs of our faculty/department/group?
- In what ways will we be supporting the Alumni Association?
- What are the needs of our alumni?
- What are the demographics of our alumni?
- What types of programs or activities are most important to them?
- What will we focus on?
- What kinds of activities will we undertake? Networking, socializing, continuing education, student outreach and support, community service?
- How will we finance ourselves? Will we collect dues from our membership? Will our faculty/department support us? Will we need to fundraise for donations?
- How will we find our alumni?
- How will we maintain interest? How will we find new volunteers?
- What is our long-term vision? In 2 or 5 years, what will the contribution of our group be?

### **C. STEPS IN FORMING ALUMNI CHAPTER**

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This is a pathway to success as a KPU Alumni Chapter. These steps might be taken in a different order, but each is an important touch point for the group to consider.

Meet with the Alumni Relations staff member and the KPU alumni association directors. They can help discuss your plans and interests, ensure that parameters for success can be met, and provide advice on a plan of action.

Meet with other interested parties. If your chapter will be based on a course of study, you should meet with the appropriate party within the faculty or department. Discuss with them the purpose, goals and activities to ensure they are aware and supportive of the proposed chapter.

Have a preliminary meeting. Invite selected alumni and any relevant university representatives. Use the meeting to brainstorm about what the chapter's goals should be and to invite interested members to accept interim appointments to the chapter committee.

Survey your constituents. The KPU Alumni Relations office can assist you in surveying alumni who could potentially be involved. This will help to determine if the chapter will be supported and what its mandate and activities should be.

Form a committee. Gather the interested parties to review the survey and consider the chapter's plans and goals. Create a Terms of Reference (a guiding document like a constitution or set of bylaws — see appendix).

Apply for Alumni Association Chapter status. Submit the Terms of Reference document to the Alumni office for review. Gather a list of at least 3 names of alumni who will support the formation of the chapter. Gather any other letters of support from the university community. The Alumni office will submit it to Alumni Association for approval.

Setup a meeting schedule. It's a good idea to send out some kind of notice or newsletter to let your membership know you've started a chapter and welcome their input for the first activities or events through the alumni newsletter or another source.

## **D. RECOGNITION REQUIREMENTS**

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The Alumni Office may withdraw recognition of an Alumni Chapter if active progress is not demonstrated in the pursuit of its objectives.

Minimum requirements include:

- holding at least one meeting each year at which business is conducted.
- electing a president/chair and a vice-president/chair at least every two years.
- electing a new president after three consecutive terms.
- communicating with the Alumni Relations office at least once per year, including submission of meeting minutes.

Alumni Office could withdraw recognition of an Alumni Chapter if its executive committee or members of the committee break any bylaws of the Alumni Association. This could include improper use alumni information or improper use of funds. Alumni Office may withdraw recognition of an Alumni Chapter if it is found to be unsupportive of or working against the wishes of its respective faculty, department, or if it is working against the wishes of the KPUAA.

Please note, however, it is alumni associations and the alumni office's wish to support every chapter and help it flourish.

## **E. TERMS OF REFERENCE**

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The Terms of Reference is the guiding document behind a 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.

The document will state the group's name, provide a mission statement and define its membership. The membership identifies those who will be recipients of programming and who will make up the executive committee. The Terms of Reference also defines the roles of the executive committee and how they and the membership can vote on issues of interest. The document outlines how the finances will be managed, how its records will be kept, how it can change its terms if needed and what would happen to its funds should it dissolve. It also helps define some rules and boundaries and helps provide guidance in case of dispute between members.

The Terms of Reference might not be referred to often once a group is established, but thinking through these matters is an important step to ensure the group can function for many years to come.

See appendix for a sample Terms of Reference document.

## **F. JOB DESCRIPTIONS**

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Clear job descriptions help volunteers understand expectations, promote good relations within the alumni chapter and help new members take ownership of their role.

Below are some standard job descriptions that can serve as a guideline. Titles and duties may be modified as necessary. Most terms will be one to two years,

with a requirement that no one individual should hold the same title for more than three years.

### **Executive Committee**

The executive committee in general will provide the decision-making for the work of the chapter. All alumni within the membership are eligible for nomination for any role on the executive committee, but those alumni with the most interest or perhaps with a specific skill set should be recruited. The executive committee should meet at minimum once per year — between two and four times per year is the norm.

### **President/Chairperson**

- Calls meetings
- Chairs meetings of the executive committee
- Creates the agenda for meetings, with input from members
- Provides leadership and direction at meetings and for chapter activities
- Serves as the contact person with the Alumni Relations Office

### **Past President/ Past Chairperson**

- Provides advice and counsel to the president as needed
- Oversees the recruitment of new members

### **Vice President/Vice Chairperson**

- Serves as a backup to the president
- Provides assistance to the president
- Often will succeed the president at the close of his/her term
- Secretary
- Keeps accurate minutes of all meetings
- Ensures the minutes are forwarded to the Alumni Relations office

Note: some chapters rotate this position for each meeting.

**Treasurer**

- Ensures accurate financial records are kept and distributed
- Prepares an annual budget
- Handles all financial transactions

**Student Representative – optional**

- Serves as a full member of the executive committee
- Acts as a liaison between current students of a specific program or faculty and the alumni chapter

**Faculty/Department/Affiliation Representative – optional**

- May serve as a non-voting member
- may be a faculty or staff member and may be appointed by the Dean or Chair

**Committee member at large (usually more than one)**

Like the executive committee for the chapter:

- May sit on ad hoc committees
- is responsible for bringing ideas and enthusiasm to the meetings
- will participate in deliberations and decisions

**G. TIPS ON BEING A SUCCESSFUL ALUMNI CHAPTER**

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**Know your alumni and what will interest them**

- Your Alumni Relations Office can help you with some demographic research. You will want to know how many are in your geographic area, as well as an idea of the largest age group. If your chapter is not based upon an area of study, you may wish to know what faculty is most represented or least represented in your constituency. Are most of them in their late twenties or early thirties? If so, they may be raising young families and you will want to keep this in mind when planning activities.
- Take the time to analyze the unique culture of your group. Think of their interests, needs and the best way to contact these people. If your chapter will be based of a young cohort, perhaps they are interested in networking events and the best way to reach them is

through social media. You might use a different approach with alumni who graduated 10 or more years ago.

### **Plan more and meet less**

- Be realistic and cautious with your plans. Set no more than three priorities for your chapter at any given time. A chapter can be completely successful if it has just one event per year. It is far better to have just one or two great and well-attended events each year rather than exhausting your team trying to put on multiple events.
- Identify your traditional events and activities and rely on past successes to guide you. Develop a work plan for new initiatives, with duties and responsibilities outlined for members, far in advance of your deadline. Schedule your meetings to coincide with your needs for your events and initiatives. Think about when you should be meeting in order to plan your specific events and activities. Set your meeting dates far enough in advance so members can plan around them. Follow your agenda at meetings. Make sure conversation doesn't go off on tangents that keep you from addressing the decisions you need to make.

### **Assign Responsibilities**

- Volunteers are usually willing to take on short or one-time assignments. Be clear on what is expected. Ensure the assignments are documented in the minutes with deadlines clearly stated and agreed upon. The chairperson or president might wish to follow up with volunteers at key times with reminders and to check in on progress.
- It is best to break down large tasks into small units. For example, asking someone to 'arrange a reunion dinner' is daunting, but asking several people to be in charge of small pieces is more manageable and probably more fun. For example, assign people to be in charge of registrations, invitations, program and venue.

### **Ask for Assistance**

- Check in with the Alumni Relations Office — they likely have some ideas you can use. Another group may have encountered similar issues or had similar ideas. Learn from other groups and steal their ideas!

### **Recruit New Committee Members**

- To keep your group energized and motivated, have a plan to bring on new members every year. If you have to rely on the same volunteers every year, you might have trouble maintaining momentum. If your executive committee comprises of volunteers who will attend meetings but who are not inclined to work outside of the meetings, then you need to replenish your reserves with fresh recruits.

### **Work with your Faculty, Student Association, or Other Groups**

- A good connection with your university cohorts will benefit your group. Consider planning your activities or events so that they tie in with the faculty's events. Supporting their event will be a far easier task than trying to create something from the ground up. Your faculty or department might be able to provide you with support including leads on volunteers or activities and events the chapter might wish to support.
- Consider joining with another chapter to do a joint event. For example, if your chapter and another chapter are each considering an activity, you may wish to pool your resources and book the facility together or plan a multi-chapter event.
- And remember, KPUAA offers events throughout the year that could benefit your chapter. There are events that you could invite your chapter to attend with little effort — for example, you could have a 'chapter table' at the Distinguished Alumni Awards, or perhaps invite your chapter members to volunteer at the welcome back week for students, or send an invitation out to your membership to attend a community event together. Feel free to piggyback on the Alumni Association events. A reception during convocation, for example, will likely draw a larger crowd than at another time of year and your participation will make the event more vibrant for every- one's benefit.

### **Financial Management**

Your alumni chapter executive will need to think about how you will sustain yourselves financially. You may want to only offer activities on cost-recovery basis. Some basic rules of financial management for Alumni Chapters:

- The university's Office of Advancement is responsible for soliciting gifts for the university and for managing all fundraising campaigns. You must not solicit donations without first consulting with the

Alumni Relations Office in order to ensure we are following university and Canada Revenue Agency regulations as well as adhering to the current wishes of the relevant faculty or department.

- An alumni chapter may be able to solicit donations for an award, scholarship or bursary, or membership campaign but before any solicitations occur or any funds are received, you must consult with the Alumni Relations Office. We can assist you in getting in touch with the right people to help with fundraising and ensure all paperwork is completed correctly.
- No member of the chapter's executive can receive payment for any services.
- Funds can only be used for chapter activities that are open to the entire membership.
- Chapter members may be reimbursed for chapter expenses but you must consult with the Alumni Relations Office before any expenses are incurred.
- Gifts designated directly to a chapter will be deposited into the chapter's university-held account. Tax receipts will be issued by the university. These funds are to be used to support the chapter's activities.

### **Programming**

Each chapter is unique in its interests and goals, but most do hold activities or events for the membership. For the chapter to be successful, it is important to monitor the wishes and needs of the membership in order to have a good turnout. Being connected to what the faculty or other affiliated groups are doing is also very helpful.

- **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, attending a university event or 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: being

part of student orientation, hosting a barbecue, hosting a convocation celebration, or 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 the university; try to find a way to use those interests in your chapters programming. For example, the Music alumni can attend a concert at KPU, or the nursing alumni can do something during the annual nursing week.
- **Reunions:** Hosting reunion events is a great way to get reconnected with fellow alumni. Some reunion events are: a tour of new facilities, a reunion reception, a dinner, a wine and cheese party, a patio party, a reunion barbecue, or a tea and cakes afternoon reception.
- **Fundraising:** It feels good to give back. Chapters may raise funds to support their activities or take on a special cause. Be sure to check with the Alumni Relations Office 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 alumni to student mentorship program can certainly use your support.
- **Communications:** Keeping in touch with your membership is important to a robust and well-supported chapter. Social media is a great way to let your alumni know about the great work you're doing and to update them regularly — keep your chapter's Facebook page updated with event information and updates on what your student cohort is doing and consider setting up a subgroup on LinkedIn under the KPU alumni group.

## **Assistance**

Throughout this handbook we have outlined many of the ways that your Alumni Relations Office can help your chapter to be vibrant and successful.

Some key areas of assistance are:

- Event coordination — we can help with invitations and provide guidance and advice on how to make your event successful.
- Newsletter — we can give you space in the alumni newsletter to add targeted communication to your chapter members and we can suggest topics or ways to communicate with your alumni.
- Contacting alumni — we can access the university’s database to find your alumni.
- Meetings — we can provide suggestions on how often to meet and how to set up your agenda.
- Website — we can host information on the Alumni section of the university’s website.
- Governance support — we will provide guidance on how to run your chapter and how to ensure your executive works well together.
- Fundraising — we can connect you with the experts to provide assistance with fundraising.

## **H. APPENDIX DOCUMENTS**

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Please submit the ‘MOU’ below and the ‘Terms of Reference’ for approval to the Alumni Relations office. The following documents can be found in the Appendix:

- Memorandum of Understanding
- Terms of Reference
- Sample Financial Statements