

CONCORDIA ALUMNI CHAPTERS PROGRAM



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Concordia Alumni Association

Concordia University of Edmonton
Alumni Relations Office

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Welcome to the Alumni Chapters Program

General Information

1. What is the Alumni Association?

The Concordia Alumni Association (CAA) is a volunteer Society. All alumni of Concordia University of Edmonton automatically become lifetime members when they graduate. The CAA works interdependently with the Office of Alumni Relations, who are paid staff of Concordia. The staff receives direction from the CAA on priorities and policies and carries out the work of connecting and offering benefits to the alumni of Concordia.

The Alumni Association is governed by elected representatives. Each of these representatives have graduated from either Concordia College, Concordia High School, Concordia University College of Alberta, or Concordia University of Edmonton.

The Office of Alumni Relations is led by the Director of Development & Alumni Relations, and the Alumni Relations Officer.

Funds to support the CAA are from its revenue generating programs, such as affinity partnerships with various companies offering alumni benefits.

The Concordia Alumni Association is a registered Society, under the Societies Act. This means that the CAA is an incorporated group, sharing a common interest.

MISSION

The Concordia Alumni Association strives to engage all alumni and students; to represent as ambassadors of our alma mater; and to maintain a lifelong connection with Concordia University of Edmonton.

VISION

To continue in the growth and development of Concordia University of Edmonton and it's Alumni Association network, and to unite as one association to celebrate the success of our alma mater and each other.

STRATEGIC DRIVERS

The Alumni Association is committed to five (5) Priorities*:

- Priority 1: Building Affinity
- Priority 2: Building Exclusivity
- Priority 3: Messaging
- Priority 4: Revenue Generation
- Priority 5: Community Profile

**Outlined in the Concordia Alumni Association's Strategic Plan 2015 – 2018*

2. Office of Alumni Relations

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

- **Alumni Benefits Program**
Concordia alumni, faculty, staff and students are able to access discounted home and auto insurance through TD Meloche Monnex. Our relationship with TD Meloche Monnex helps fund many of our alumni programs.
- **Alumni Mentorship Program**
This program matches up alumni mentors with student mentees for a set amount of time.
- **Alumni Events**
The alumni organize a variety of events throughout the year. Some examples of this are:
 - Opening Night Reception for Drama productions
 - Summer BBQ
 - Wine and Cheese Receptions
 - Pub night for new alumni
- **Alumni Newsletter**
Our e-newsletter is sent out three (3) times per year. The newsletter keeps alumni up to date with events happening on and off campus and features stories on alumni and their achievements.
- **Alumni Chapter's Program**
This program allows alumni with specific connections to Concordia to continue to gather, network and support Concordia in a specific way.

3. Alumni Chapter's Program

An Alumni Chapter is a group of alumni who share a common connection with Concordia and each other. The Chapter's program is a way to stay in touch with a group of friends, meet new people, and stay involved with Concordia in a way that is meaningful to them.

Chapters help promote the interests of a particular group and provide overall support for Concordia. They create communication between Concordia and alumni groups, and provide networking, educational and social opportunities for their members.

Alumni Chapters may include areas such as:

- Drama Alumni Chapter
- Music Alumni Chapter
- MISSM/MISAM Alumni Chapter
- Athletics (Thunder) Alumni Chapter

What do Chapters do?

Chapter volunteer member's work together to organize gatherings or events for their alumni groups. Some Chapters may have a broad mission and are very active, while others may have a small focus, such as fundraising to support student endeavors, student scholarships, or to providing mentoring to students in a department. Some ideas are: organized pub night, student vs. alumni athletic event, continuing education credit course, etc.

How do Chapters work?

Chapter members usually meet between two to four times per year to discuss what kind of events or opportunities would interest their alumni. They plan the type of events, financial strategies, venue, and allocate the responsibilities.

The Office of Alumni Relations can help. They will assist in the planning process, offer advice on what has worked previously, and may assist in booking event venues. Alumni Relations can assist in contacting alumni as they have access to the Concordia alumni database. You can also work with them to include your events in the e-newsletter, or to highlight one of your alumni. Please feel free to contact the Alumni Relations office at alumni@concordia.ab.ca.

For most people, attending university was a significant life 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 experiences with others and with the current students. It is great fun to meet other alumni who share similar experiences and it is rewarding to be able to meet current students. Serving on a volunteer board is also a great skill to add to your resume, and there are many valuable networking opportunities.

How to Start a Chapter

An Alumni Association Chapter can be formed by a group of alumni from almost any identifiable group that existed on campus.

A 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 Concordia from the membership
- Encourage the best students to attend Concordia University of Edmonton
- Assist students and alumni in raising funds to support their activities, or for scholarships
- Offer social activities and communications for alumni to stay connected

There needs to be interest from alumni to start a Chapter – we will not support a Chapter unless we know that there is alumni support. We would also like to ensure that the appropriate faculty or department will support the Chapter (if applicable).

Questions to Ask as you Consider Starting a Chapter

- What is our purpose? What do we hope to accomplish?
- In what ways will we support the needs of our group? In what ways will we be supporting the Concordia Alumni Association?
- What are the needs of our alumni? What are the demographics of our alumni? What programs or activities will interest 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 need to fundraise?
- How will we find alumni?
- How will we maintain interest? How will we find new volunteers?
- What is our long-term vision? In five or ten years, what will the contribution of our group be?

Steps in Forming a Chapter

These are the steps to success. The steps may be taken in a different order, but each step is an important checkpoint for the group to consider.

Meet with the Alumni Relations Office

The staff will 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

Set up and invite selected alumni and any related Concordia 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 Board of Directors.

Survey your constituents

Surveying alumni who potentially could be involved could help determine if the Chapter will be supported and what its mandate and activities should be. Please contact the Alumni Relations Office for assistance with this.

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 a set of bylaws – see appendix).

Apply for Alumni Association Chapter Status

Submit the Terms of Reference document to the Alumni Relations Office for review. If you are able to get letters of support from alumni or the Concordia community, please include those as well. The Alumni Relations Officer will compile the information and submit it to the Alumni Association Executive for approval.

Congratulations!

The Alumni Relations Office can help you set up a meeting schedule. It is a good idea to send out some kind of notice to your alumni to let them know you have started an Alumni Chapter and welcome their input for activities or events. A notice will be placed in the e-newsletter about any new Chapters.

Recognition Requirements

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

Minimum requirements include:

1. Holding at least one meeting each year at which business is conducted.
2. Electing a president and a vice-president at least every two years.
3. Electing a new president after two consecutive terms.
4. Communicating with the Alumni Relations Office or CAA at least once per year, including submission of meeting minutes.

Concordia Alumni Executive could withdraw recognition of an Alumni Chapter if its executive committee or member of the committee break any bylaws of the Concordia Alumni Association. This could include but is not limited to improper use of a mailing list or improper use of funds. Concordia Alumni Executive 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 Concordia Alumni Association.

Please note, however, that it is the Alumni Executives wish to support every Chapter and help them to succeed.

Terms of Reference

The Terms of Reference is the guiding document behind a Chapter. Like a constitution or set of bylaws, it describes 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 the recipients of programming and who will make up the executive committee. The Terms of Reference also defines the roles and powers of the executive committee. 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 can also help 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 A for a sample Terms of Reference document.

Job Descriptions

Clear job descriptions help as volunteers understand expectations, promote good relations within the 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 two terms.

Executive Committee

The executive committee, will complete the decision-making for the work of the Chapter. All members of the executive committee excluding the president have voting authority on agenda items. In the case of a deadlock the president shall serve as the deciding vote. 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 a minimum of once per year – between two and four times per year is the norm.

President

- 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 Office of Alumni Relations

Past President

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

Vice President

- Serves as backup to the president
- Provides assistance to the president
- Will often succeed the president at the close of his/her term

Secretary

- Keeps accurate minutes of all meetings
- Ensures minutes are forwarded to the Office of Alumni Relations (alumni@concordia.ab.ca)
- Note: this position may be rotated for each meeting

Treasurer

- Ensures accurate financial records are kept and distributed
- Prepares an annual budget
- Note: the Treasurer of the CAA will assist with all of these duties if required

Student Representative

- Serves as a full member of the executive committee
- Acts as a liaison between the student group and the alumni Chapter

Faculty/Department/Affiliation Representative

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

Director at Large/Board Member (usually more than one)

Like all other members of the board, the director-at-large:

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

Tips on being a successful Chapter

Know your alumni and what will interest them

The Office of Alumni Relations can help you with some demographic research. You will want to know how many alumni are in your geographic area, as well as an idea of the largest age group. If your Chapter is not based on an area of study, you may wish to know what faculty is most represented or least represented in your constituency.

Take the time to analyze the unique culture of your group. Think of their interests, needs, and the best way to contact them.

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 one or two great and well-attended events each year rather than exhausting your team by trying to put on multiple events for smaller groups.

Identify your traditional events and activities and rely on past successes to guide you. Develop a plan for new initiatives, with duties and responsibilities outlined for members, far in advance of your deadline. Schedule meetings to coincide with the need for your events and initiatives. Think about when you should be meeting in order to plan your specific event 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. It is also best to break down large tasks into small, manageable units. Be clear on what is expected. Ensure the assignments are documented in the minutes with deadlines clearly stated and agreed upon. The President might wish to follow up with volunteers at key times with reminders and to check in on progress.

Ask for Assistance

The Office of Alumni Relations is always happy to assist you, and they likely have some ideas you can use.

Recruit New Board Members

To keep your group energized and motivated, have a plan to bring on a new member every year. If you have to rely on the same volunteers every year, you may 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 Groups, or Other Groups

A good connection with the campus will benefit your group. Consider planning your activities or events so that they tie in with other events on campus. Supporting their event will be a far easier task than trying to create something from the ground up.

Student groups will help you keep in touch with the current student body and might also suggest events or activities for you to support. Most alumni are keen to support their students and this can be a major focus for the Chapter.

4. Financial Management

All Chapters are required to provide the CAA with an annual budget. This would include budgets for Chapter events, printing, photocopying, mailing, and the like. Normally we would ask that budgets be submitted by October 1, with the new budget year beginning April 1. Submitted budgets will be reviewed by the CAA for approval.

There are some strict rules that must be followed when dealing with donation appeals and fundraising, so please be sure to speak with Alumni Relations and/or CAA about your ideas. Any appeals must go through the CAA.

The Concordia Alumni Association is a registered society. Chapters are able to do fundraising (gaming) for their Chapter through the CAA, as long as all regulations are followed for the Alberta Gaming and Liquor Commission. Please contact the Alumni Relations Office to discuss any fundraising needs you may have.

All monies will be held either with the CAA or with the Office of Alumni Relations. Alumni Chapter funds may not have a separate bank account.

Basic Rules of Financial Management for Chapters:

- Concordia University of Edmonton's Development Office is responsible for soliciting gifts for the University and for managing fundraising campaigns. You must not solicit

donations without first consulting with the Office of Alumni Relations. This is to ensure we are following Concordia's and Canada Revenue Agency regulations.

- A Chapter may be able to solicit donations for an award, scholarship or bursary, but before any solicitations occur, you must discuss with the Office of Alumni Relations. We can assist you in getting in touch with the right people to ensure all paperwork is completed correctly.
- No member of the Chapter can receive payment for any service.
- 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 Office of Alumni Relations before any expenses are incurred. Reimbursing volunteers may take some paperwork and time, so it is best to see if the Alumni Office can pay the bill on your behalf.
- Gifts designated directly for a Chapter will be deposited in to the CAA's University account. Tax receipts will be issued by the Concordia University of Edmonton.

5. 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. It is beneficial to remain current with faculties, programs and student groups.

Some common events:

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 solidify the membership. Examples: of some social events are: pub nights, wine tastings, skating parties, barbeques, or attending a Thunder sports game.

Student Events:

Alumni love to support and connect with today's students. It is a reminder that University involvement doesn't have to stop at graduation and a way to improve the student experience. Some examples of student events are: hosting a Chapter orientation for your faculty or department, hosting a student pub night and hosting networking activities.

Special Events:

Capitalize on the unique interests of your Chapter. Whatever your connection to Concordia, try to find a way to use those interests in your Chapter's programming. For example, Drama Alumni hosting a reception after a drama performance, Public Health Alumni hosting a continuing education seminar, etc.

Reunions:

The Office of Alumni Relations will assist with planning and organizing reunions. Currently we are developing a handbook for planning a reunion. Please contact alumni@concordia.ab.ca if you would like to discuss having a reunion.

Fundraising

Chapters are able to raise funds to support their activities or take on a special cause. This would include endowing a bursary or scholarship for students. Be sure to check with the Office of Alumni Relations before soliciting money – we can offer assistance and guidance to ensure success.

Mentorship

Students gain valuable knowledge from our Alumni who are already working in their chosen field. The Alumni Relations Office has started a mentorship program. Please contact alumni@concordia.ab.ca

Communications

The CAA has an e-newsletter that is distributed three times per year – beginning of fall semester, beginning of winter semester and after graduation. The newsletter includes stories highlighting what Alumni are doing, alumni and campus events, and stories from the campus. Alumni Relations also has a Facebook page and LinkedIn page. To get news out to alumni, please send articles or information to alumni@concordia.ab.ca. We are happy to spread the word of your Chapter!

6. Assistance

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

Some key areas of assistance are:

- **Event Coordination** – we can help with registration set up, and choosing and negotiating with vendors. We can provide guidance and advice on how to make your event successful.
- **Newsletters** – we welcome stories and information about your Chapter for our Alumni E-newsletter.
- **Mailing lists** – we can access Concordia’s database to find your alumni.
- **Meetings**- we will host meetings and provide suggestions on how often to meet and how to set up your agenda.
- **Website** – we are happy to host information on the alumni section of Concordia’s website.
- **Social Media** – we are happy to post information about events and successes within your Chapter.
- **Board Support** – we will provide guidance on how to run your Chapter and how to ensure your executive works well together.
- **Fundraising** – we will work together in order for you and your group to best achieve your fundraising goals.

Appendix A

Concordia University of Edmonton Athletics (Thunder) Alumni Chapter

TERMS OF REFERENCE

NAME

The name of this committee shall be the Concordia University of Edmonton Athletics (Thunder) Alumni Chapter, hereinafter known as the Chapter.

MISSION

To promote and support the goals of Concordia University of Edmonton, the Concordia Alumni Association, and the Athletic Program.

CHAPTER MEMBERSHIP

- All alumni of any athletic teams supported by Concordia University of Edmonton shall be members of the Chapter.
- Any individual who has rendered outstanding service to the Chapter may become an honorary member upon identification of such by the Executive Committee.

EXECUTIVE COMMITTEE

1. The executive committee shall plan and implement the goals of the Chapter, as long as they are not in conflict with Concordia University of Edmonton, the Concordia Alumni Association, or a sponsoring Faculty, student group or club.
2. The powers of the Executive Committee shall include:
 - a. Promoting the goals of the Chapter
 - b. Approving an annual budget for the Chapter
 - c. Raising funds for scholarship or bursaries
 - d. Making policies, rules and regulations for operating the Chapter
 - e. Voting authority of agenda items
3. The Executive Committee shall consist of the following officers:
 - a. President
 - b. Vice-President
 - c. Secretary
 - d. Treasurer
 - e. Up to 3 Directors-at-large
 - f. Up to 3 student representatives
 - g. A faculty representative
4. The President, or in his/her absence, the Vice-President, shall preside at all meetings of the committee. In the absence of both, a Director shall be appointed by members present.
5. Vacancies shall be filled by a majority vote of the Committee for the remaining term of the position vacancy.