

SMU Alumni Chapter Volunteer Handbook

2008-2009



Dear Chapter Leader,

On behalf of SMU Annual Giving and Alumni Relations, thank you for serving as an alumni chapter volunteer in your city. We are delighted that you have agreed to serve in a volunteer leadership role. Regional programming is an important part of our overall effort to keep alumni connected to SMU and to one another and would not be possible without alumni leadership such as yours. Your involvement, ideas and enthusiasm will ensure that we continue to build SMU's commitment to alumni, no matter where they live. As an alumni volunteer you are an ambassador for SMU and the core of the SMU community.

Sincerely,

Lyndsey Hummert Hill'05
Assistant Director, Chapter Programs



Mission

SMU Alumni Chapters exist to foster communication, interaction, and involvement between Southern Methodist University and our community of alumni worldwide through meaningful off-campus programming.



Red Chapters

- Red Chapters are determined by the University as having a large alumni base and financial resources.
- Leadership of Red Chapters is approved by the regional committee of the Alumni Board.
- Red Chapters are expected to plan and execute 4 events per year.
- Red Chapters are provided with seed money.
- Red Chapters are located in:
 - Atlanta
 - Chicago
 - Houston
 - Los Angeles
 - New York
 - San Francisco
 - Washington, D.C.

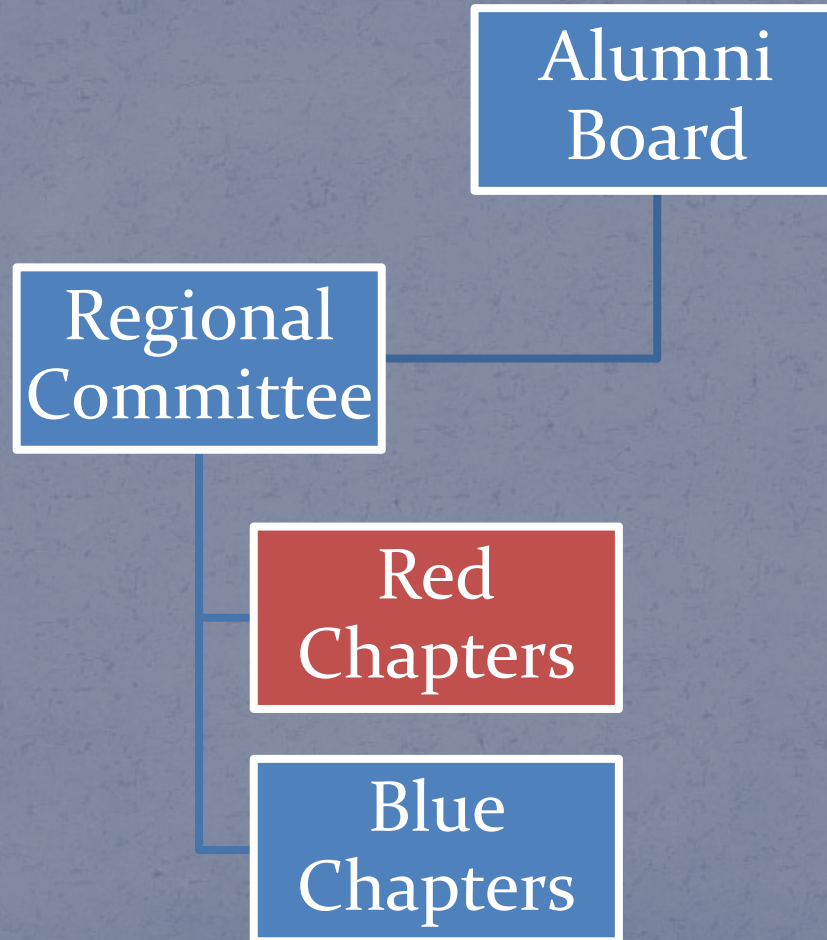


Blue Chapters

- Blue Chapters are established at the request of alumni living in a city where a Red Chapter does not exist.
- Establishment of a Blue Chapter is approved by the Alumni Relations Office in conjunction with the regional committee of the Alumni Board.
- An SMU alum must volunteer to serve as a Blue Chapter president before a Blue Chapter can be officially established.
- Blue Chapters are expected to plan and execute 2 events per year.
- Blue Chapters are not provided with financial support from the university.



Chapter Structure



Red Chapter Leadership

Red Chapter Leadership is comprised of a chapter president and a team of at least six members. Ideally the six members represent a broad spectrum of age ranges and interests/connections. Setting up this structure provides the opportunity to create a variety of programming to serve different constituencies. A seven person team also ensures that the chapter president is not working alone and provides a bench of talent to replace the chapter president.



Red Chapter President

Role

- Serve as primary contact for city/area and for Alumni Relations for a two-year term.
- Coordinate chapter team members to fill vacancies, address team needs and share information.
- Lead biannual chapter team brainstorming and planning sessions.
- Participate in key events held by the University in city/area.
- Participate in and promote chapter events.
- Assist Alumni Relations in identifying future leadership and a president-elect from city/area.



Red Chapter President Continued

Nomination/selection process and criteria

- Any SMU alumnus can be nominated to serve as chapter president. Alumni also may self nominate.
- A nomination form will be created to aid in the nomination and selection process.
- The regional committee of the Alumni Board will approve, with the recommendation of Alumni Relations, the Red Chapter presidents at the April Alumni Board meeting.
- If the president does not fulfill his/her duties, Alumni Relations, together with the regional committee of the Alumni Board, will select a new president.



Red Chapter Leadership Team

Role

- Support chapter president in programming. Serve a constituency that best meets volunteer's profile and interest. Work with chapter president and team to develop programming and related marketing and promotions. Take leadership role with constituency.
- Attend at least one of the two chapter leadership meetings per year.
- Participate in and promote chapter events.
- Participate in key events held by the University in city/area.
- Assist chapter president in identifying future leadership from city/area.
- Suggested leadership roles are:
 - Networking/Social Programming Co-Chairs
 - Family Programming Co-Chairs
 - Cultural Programming Co-Chairs



Blue Chapter Leadership

- Blue Chapter Leadership is comprised of a Chapter President.

Role

- Serve as primary contact for city/area and for Alumni Relations for a two-year term.
- Participate in and promote chapter events.
- Assist Alumni Relations in identifying future leadership from city/area.

Nomination/selection process and criteria

- Any SMU alumnus can be nominated to serve as a Blue Chapter president. Alumni also may self nominate.
- Alumni Relations approves the Blue Chapter President in partnership with the regional committee of the Alumni Board.



Events/Activities

In order to establish a presence in the chapter cities and to meet the needs of SMU alumni, our expectation is for Red Chapters to hold four events per year and Blue Chapters to hold two events per year. In order to draw interest from a wide array of Alumni, we recommend diversifying the kinds of events you plan.

Types of events include:

- Social/Networking Events
- Cultural/Educational Events
- Family/Weekend Events
- Athletics Events
- Community Service Events



Social/Networking Events

Based on alumni feedback, ranked #1 as type of event they would be more likely to attend

- Happy hours, power breakfasts, lunch groups
- Live music/concerts
- Social gathering (holiday party) at an alum's house
- Career-focused events



Cultural/Educational Events

Based on alumni feedback, ranked #2 as type of event they would be more likely to attend

- “Interest area” (politics, economics, etc.) lunch or breakfast groups
- Book club
- Museum, theatre, symphony



Family/Weekend Events

- Family day at a local museum, zoo or park
- Picnics
- Softball/dodgeball/kickball games or tournaments
- Dog Park Saturday
- Local carnivals and fairs



Athletics Events

- Football game-watching party at sports bar or at someone's home
- Support SMU teams when they come to town
- Attend local professional sports games
- Create a team for a local softball league



Community Service Events

- Habitat for Humanity
- Food Drives
- Tutor at a local school
- Help with SMU students if they are doing an Alternative Spring Break near you



Activity Expectations

- Work with chapter team to create annual (or semester) calendar of programming and submit to Alumni Relations for posting on Web site.
- Include a sign-in sheet at each activity, specifically requesting updated contact information (including emails). Send sign-in sheets (with new or changed contact information) to Alumni Relations so we can update the information.
- Use nametags at events.
- Consider listing a host committee on invitations to encourage attendance. People will come to events if they think they're going to know others in attendance.
- Chapter leaders should act as official hosts for gatherings and activities. They should introduce themselves to guests and welcome alumni. Follow up with those alumni who want to get involved with the chapter and share information with Alumni Relations. Chapter team members can step in if the chapter president is unavailable.
- Send Alumni Relations photos to be featured online and in *SMU Magazine*.
- Alumni Relations recommends cost recovery event planning. Plan events where you can charge admission, where there is an open bar, host an event at a Chapter member's home, have everyone bring their own food to a picnic, etc.



Budget Guidelines for Red Chapters

- SMU will provide seed money for each Red Chapter.
- This money can be used in several ways: 1) Nationally televised SMU football game-watching 2) Down payments for event venues. 3) Prepaid tickets for group events. 4) Catering for a party (note: SMU will not pay for alcohol)
- For unfunded events, alumni are expected to pay for themselves.
- For ticketed events, SMU funds can be used as a down payment, but charging a ticket price is recommended to ensure attendance.
- If chapters don't adhere to leadership structure and planning, their budgets will be reevaluated.
- Alumni Relations must approve, in advance, how the budget is used. A budget approval form will be created for this purpose.



Confidential Alumni Lists

SMU has a unique relationship with its alumni and tries to honor and respect the privacy that alumni have come to expect from their alma mater. To that end, we are very careful in sharing personal information with nonemployees. That said, we understand the importance of having this information in order to be more effective in your roles. The chapter president will receive a confidential list of all alumni within your geographic area at the beginning of each semester. It is not available for non-SMU purposes of any kind, including commercial solicitations or the expression of personal, political, social or economic views. This policy applies to all alumni and University personnel. A waiver for confidentiality/security purposes will be provided for you to complete and return to Alumni Relations. Although you may directly send out emails or mailings to your constituents, the amount of returned mail and email is such that it makes more sense for our office to do it for you. We also remove the returned mail and email addresses from our database, so if you decide to send mail on your own, we'll want you to follow our process to help us remove these bad addresses. We will work with each chapter directly to find its preferred method of distribution.



Authorization of Alumni Contact Information

The chapter president is the primary contact for alumni in your area. As such, your contact information (directly or via an email alias) will be publicized on all chapter communications, including the Web, unless otherwise noted.



Event Marketing and Communications

- Alumni Relations will email a chapter calendar to alumni in each chapter area once per semester (deadline for the fall calendar is July 1 and the deadline for the spring calendar is November 1).
- In order to send an email marketing an event, Alumni Relations will need the request and the copy for the email four weeks before the e-mail needs to be sent out. We recommend sending email invitations 3-4 weeks in advance of the event with a reminder sent one week prior, so we will need the request for an email invitation about two months before the event.
- Alumni Relations can set up online RSVPs, if requested.
- Alumni Relations will ensure that communications are being sent to the most recent addresses and contact information; biannual updates of the list will be sent to the chapter president, if requested.
- Alumni Relations will consider requests for one to two mailings per year for Red Chapters.



Chapter Web Pages

- Chapter calendars, invitations and chapter team contact information and photographs will be posted on chapter Web pages.
- Please email updates (including calendar of events, photos, etc.) for your chapter.



The Role of Alumni Relations

- Respond in a timely manner to all requests, mailings, postings, etc.
- Maintain chapter Web sites.
- Update address information.
- Host biannual brainstorming/planning conference calls for chapter leaders.
- Provide a banner to Red Chapter presidents.
- Provide spirit boxes with nametags and other available giveaways to chapter leadership.
- Provide a budget to Red Chapters—see budget guidelines for more details.
- Provide a resource book for each Chapter President with ideas and sample forms.
- Make this program as easy and rewarding as possible!

