



Lakehead
UNIVERSITY

Alumni
Engage. Celebrate. Share.

Alumni Association of Lakehead University

**Chapter Handbook and
Chapter Package**

2014

Approved July 2014

Table of Contents

| | |
|---|----|
| Lakehead University Office of Alumni and Community Relations | 4 |
| Alumni Association of Lakehead University | 4 |
| What are the objectives of a Chapter? | 4 |
| Why become a Chapter Member of the Alumni Association of Lakehead University? | 5 |
| Who is eligible to be a Chapter Member? | 5 |
| What are the different types of Chapters? | 6 |
| How do I start a Chapter? | 6 |
| How do we become recognized as an AALU Chapter? | 7 |
| How are Chapters and activities funded? | 8 |
| Liability | 9 |
| Hosting a successful event..... | 9 |
| Questions to ask as a Chapter before going any further: | 9 |
| Additional things to consider when planning an event..... | 10 |
| Alumni Database | 11 |
| Criteria for Success..... | 11 |
| Succession Planning | 12 |
| Retention and Succession Planning | 12 |
| Recruitment..... | 13 |
| The Bigger Picture..... | 14 |
| Appendix I - Chapter Charter Request | 15 |
| Appendix II – Chapter Memorandum of Understanding | 16 |
| Appendix III – Chapter Committee Members and Roles | 19 |
| Appendix IV – Proposed Events for the Year | 20 |
| Appendix V – Chapter Event Budget Template | 21 |

Appendix VI – Chapter Event Checklist 22

Appendix VII – Social Media Toolkit: Alumni Chapters 24

Lakehead University Office of Alumni and Community Relations

The Office of Alumni & Community Relations acts as a liaison between the Alumni Association of Lakehead University and Lakehead University itself. Furthermore, it connects our community partners, donors and Alumni to one another in a collaborative effort through active engagement, events, mentorship programs and networking opportunities.

The office is here to support the initiatives of our chapters through on-going communication, guidance, and dedication to assisting Chapters in its mission of engaging fellow alumni.

Alumni Association of Lakehead University

The Alumni Association of Lakehead University (AALU)'s primary objective is to build and maintain relationships with alumni and friends of the University by building programs that will assist alumni, current students and the University in general. Chapters also provide alumni with the opportunity for social interaction, networking and volunteer opportunities.

Lakehead University has increasingly demonstrated a commitment to encourage and support the continued involvement of its graduates. Alumni have made contributions to through supporting future alumni, community initiatives, governance and student life programs.

Both the University and the AALU wish to ensure that the University's relationship with its alumni is a strong and positive lifelong partnership.

The mission of the Alumni Association is: To provide a supportive Alumni Community where our members have opportunities to engage, celebrate, and share.

What are the objectives of a Chapter?

Chapters of the Alumni Association of Lakehead University work to promote the relationship and involvement between Lakehead alumni and the University. In doing so, the Chapters provide a positive presence for Lakehead University and the AALU. Chapters also provide alumni with the opportunity for professional and social interaction, and volunteer opportunities. Outlined below are the specific objectives of a chapter.

These objectives include:

- The opportunity to connect with committed alumni and students as well as University and community leaders
- Involvement in University-wide initiatives and activities.
- Opportunities to share and develop skills and networks.

- Opportunity to make a difference in a meaningful way to the lives of students, alumni and the University community.
- To create a feeling of family, and demonstrate that the Alumni Association is passionate about continuing a positive relationship with its alumni.
- To give alumni an opportunity to get together with other alumni in a geographic area or who share similar interests (specific program/faculty/campus).

Why become a Chapter Member of the Alumni Association of Lakehead University?

- Volunteering is adding value to the lives of others as well as enriching your own personal and professional experience.
- Chapters actively coordinate events for all alumni.
- Chapters provide Alumni with opportunities that they may not have been previously aware of. For example, programming such as mentorship, engagement and interaction with fellow Alumni, business opportunities, etc.
- By becoming a member you will benefit from leadership experience, exposure to event planning, collaborating in a group atmosphere and enhancing your public relations skills.

Who is eligible to be a Chapter Member?

- Chapter Members shall include the following:
 - All Lakehead University students (current or former), after having successfully completed five full credit equivalents (5 FCE).
 - Any person who has graduated from Lakehead University.
 - Honorary Degree recipients.
 - Friends and critical members of the community and of the university as identified by the Alumni Association. Partners of members are considered “Friends of the University” as well.
- A minimum of 6 individuals are required to start a chapter committee, of which 5 individuals or 80% have to be Lakehead University alumni. All voting members of the chapter board must be Lakehead University alumni.

- Chapter participation of any kind should ultimately be voluntary; though membership would be automatic based on the defined parameters of the Chapter (i.e. Geographic, academic, athletic, demographic, etc.)

What are the different types of Chapters?

Geographic Chapter

The distinguishing and uniting characteristic of a geographic chapter is location. The Toronto Chapter, Ottawa Chapter, or Calgary are examples of geographic chapters. A minimum of 6 local, interested alumni and friends of Lakehead University who live in a geographic area are required as a chapter base.

Constituent Chapter

In the case of a constituent chapter, a group of 6 or more alumni who are interested in maintaining their link with the University and its alumni but who represent or identify most with a particular University Faculty or Department (i.e. Forestry), athletics (i.e. Hockey), Residence (i.e. Bartley Residence or Geraldton House etc) or other constituency (such as Orillia Lakehead University graduates) form a chapter.

How do I start a Chapter?

When initially forming a chapter, individuals will be required to participate in a chapter orientation session with the Office of Alumni and Community Relations. This is to assist all members on what they can expect and what is expected of them.

The Office of Alumni and Community Relations will provide assistance where possible to help you in establishing a chapter, which will include, but is not limited to:

1. Answering your questions and offering advice to get you on your way, providing insight on organizing a chapter event, recruiting members or securing event sponsors.
2. Putting you in touch with other alumni in the area who have expressed similar interest.
3. Bringing and keeping you up to-date on recent events or initiatives undertaken by the University in your area.
4. Compiling a list of all alumni in your region for whom we have contact information.
5. Organizing interested alumni to discuss the formation of the chapter and possible future events or activities. Whenever possible an AALU or Office of Alumni and Community Relations representative will be in attendance at the initial meeting to provide information.
6. Send chapter news via e-mail to alumni with e-mail addresses.

Any alumni group may organize a chapter in accordance with the policies and mission statement of the AALU. Chapter leaders help select and organize all aspects of their activities and serve as liaison between the chapter and the University. In turn, the AALU and the Office of Alumni and Community Relations will do all they can in order to help you make sure your chapter is a success.

How do we become recognized as an AALU Chapter?

Provide the Office of Alumni and Community Relations with a Chapter Charter Request, Memorandum of Understanding, and list of all your committee members using the enclosed forms (see Appendix I, II, and III). Please fill in all the blanks, i.e. full names, addresses, phone numbers, e-mail addresses, and, of course, their official roles within the chapter.

All Chapters are required to proceed through a 3 stage process for the life span of the Chapter.

Stage 1

Interested alumni will congregate with the intent to form a chapter. If those individuals decide to move forward then they will arrange to meet with the Director of Alumni & Community Relations to determine the level of interest in a particular community. If it is determined that there is potential for support of a potential Chapter then the individuals will approach the Alumni Association Board of Directors.

When a chapter is initially establishing it will proceed with a probationary period of 1 year to determine if the Chapter can be successful and sustainable. This means there will be a review gathered from event statistics of practices, events, and success criteria (See appendix VI).

Once a chapter has undergone the 1 year probationary period and deemed sustainable then they will move into Stage 2 of the process.

Stage 2

Each Chapter must identify a structure of leadership whether formal or informal. As it is our hope that our Chapters have the ability to grow organically this handbook is designed to assist with all your needs as a growing chapter.

You will be required to send a signed Chapter Charter Request (see Appendix I) to the President of the AALU care of the Office of Alumni and Community Relations.

Chapters must also hold a minimum of two alumni events each year in order to retain their official status. Chapters must also schedule and conduct regularly scheduled Chapter organizing committee meetings. Two meetings minimum per academic year are required.

Once a Chapter has reached a size of more than 12 Chapter organizing committee members and/or are hosting more than 6 events a year they will be required to adopt a

formalized structure, which is outlined in Stage 3.

It can also be determined by the AALU at any time if a Chapter has surpassed Stage 2 and should be categorized as at a Stage 3 level.

Stage 3

Chapters at this stage will be required to implement a formalized structure. This means establishing a hierarchical structure and operational context similar to the Alumni Association Board of Directors. Chapters will be required to hold quarterly meetings as well as record those meetings and submit to the Board of Directors for reference. This will ensure that Chapters are operating in a responsible and accountable manner.

As an elected board and group of officers, it is suggested that members be diverse in age, gender, and/or faculty, with specified terms of office and assigned functions for each board position. Regular board meetings publicized in advance at convenient times and locations, which are open to the membership and new members.

Written agendas, minutes, and financial reports should be circulated to the greatest number of members possible and on file in the Office of Alumni and Community Relations offices.

In order to be deemed an official chapter of the AALU, your chapter must identify a President, Vice-President, Treasurer and Directors – all nominated for a minimum one year term (see Appendix II). Terms for all chapter positions should be staggered.

The Chapter is expected to conduct itself in a manner consistent with the goals, objectives and mission of Lakehead University, and the AALU.

How are Chapters and activities funded?

Annually the AALU will set its program objectives and dedicate a sum to support chapters from its revenues. As a rule, however, chapter events should be planned to break even or to be profitable.

An annual fund will be allocated to Chapters through the Board of Directors and the Office of Alumni and Community Relations. However, Chapters are required to outline an annual program plan and budget to the AALU Board (see Appendix IV). It is ideal to submit this in April of each year for the ensuing fiscal year: May 1 to April 30.

The Chapter budget is to be handled by the Chapter and reported at the end of each academic year to the Alumni Association Board of Directors. Finances will be jointly managed between each Chapter and the Office of Alumni and Community Relations.

Chapters can also raise funds to cover expenses through charging registration fees at events.

Considering its overall objectives and each Chapter's ability to contribute to these

objectives, the AALU will provide Chapters with additional grants based on the total funding available, total requests made and an evaluation of the Chapter's ability to meet stated objectives.

Grants will be conditional on meeting planned objectives. Renewed funding from the AALU will take into consideration whether individual chapter objectives were met.

Liability

As an organization our volunteers are important to us and we want them to feel secure in acting on our behalf.

Organizers of events can be held personally liable for acts or omissions in running events if certain rules are not followed.

According to the Canadian Universities Reciprocal Insurance Exchange "any officer, director, etc., including volunteers" while acting on behalf of the university is insured.

Their (CURIE) approach to "while acting on behalf of" is that the individuals involved have direct approval of the University to act in that capacity and that the University is aware of and has approved the activity.

Hosting a successful event

If you are not an experienced event organizer, don't worry. The following outlines some of the elements you will have to consider when planning an event.

A few suggested activities include:

- ✓ Receptions with guest speakers (visiting University official, local celebrity, prominent alumna/us, etc.)
- ✓ Family picnics
- ✓ Monthly gatherings at a favorite local pub
- ✓ Theatre evenings
- ✓ After Business style networking events
- ✓ Educational seminars/workshops
- ✓ Recruitment/Alumni event partnerships
- ✓ Receptions for newly-accepted Lakehead University students or graduates new to the area (i.e. Send-off receptions)
- ✓ Golf tournaments (or other athletic events)
- ✓ Theme parties (luau, Texas Bar-B-Q, Chinese New Year)
- ✓ Garden parties
- ✓ Wine and cheese tasting party

Questions to ask as a Chapter before going any further:

- Why are we having this event?
- What is our goal or objective?
- What kind of event is it? - Family, strictly alumni, sporting event, pub night etc.

- What is our overall budget?

Target Audience:

- Who are we planning this event for? – Specific faculty, general alumni, year of graduation, etc.
- What do they like to do? What are their interests?
- Why would they want to attend this event? What's in it for them?
- What are their general demographics? (age, gender, etc.)
- What is their emotional tie to our group/organization and how can we tie that into the event to make them feel connected to the cause/event?
- How can we make them feel special at the event?

Roles and responsibilities:

- Who is/are the event lead/(s)?
- What are the responsibilities to plan and execute our event?
- Who is responsible and accountable for each part of the event?
- Do we have enough volunteers to prepare for the event?
- Do we have enough volunteers to set up, manage and clean up event?
- How are we going to thank volunteers and anyone else who supports the event?

Setting a date:

- What else is happening on or around our potential event date that could pose conflicts?
- Would our audience prefer a day-time, evening or weekend event?
- What is our timeline for the development and execution of the event? Do we have enough time to properly plan and promote the event?

Communication:

- How are we telling our audience about the event?
- When should we tell them and how often?
- How are we communicating with our guests once they are at the event? (Program, presentation, posters, directional signage, etc.)

Additional things to consider when planning an event

1. Obtain a written confirmation from the venue in order to be protected against possible miscommunications, such as additional charges.
2. Determine who will be responsible for accepting RSVPs, collecting payment if applicable, preparing nametags in advance and maintaining guest lists and address updates.
3. Every effort should be made to budget so that the Chapter will break-even or obtain a modest surplus when conducting activities, rather than a deficit. Advance reservations/registration gives an indication of attendance and

collecting payment in advance is also advisable.

4. Arrange to have a registration table at the event so that a point of entry and welcome is established where a guest book, tickets, nametags, address updates, and business cards for a prize draw (to help us update our alumni database) can be managed neatly and efficiently as guests arrive.
5. When hosting an event photographs should be taken whenever possible. Please ask the photographer to transcribe the name, and whenever possible degree and year of graduation of the individuals in the photos.

Alumni Database

Data on alumni relative to your geographic or constituent chapter will be released with the approval of the AALU and the Office of Alumni and Community Relations. Please note that the data made available will include name, address, graduating year, and occupation of each member. A confidentiality agreement must be signed by the Chapter President before any data will be released.

Lakehead University
Office of Alumni and Community Relations
955 Oliver Road
Thunder Bay, Ontario
P7B 5E1
Phone: (807) 343-8155 or (800) 832-8076 (North American residents only)
Fax: (807) 343-8999
Email: alumni@Lakeheadu.ca
Web: www.lakeheadualumni.ca

Criteria for Success

Hold two event per year that promotes the goals and objectives of the Chapter as described in the stages (pages 7-8). Following the event, a summary should be completed and forwarded to the AALU so as to include the event results in the AALU membership communications. All Chapter events shall be held in a manner, which is consistent with the overall goals and objectives of the AALU and the mission of the University and not duplicate existing programs with same objectives/constituencies.

Success can be measured in a number of ways both on a quantitative level and qualitative level. For example a Chapter can show success by a clear demonstration of growth within participants at events, increase in members, etc. Here are some additional examples.

- Alumni participation/attendees.
- Providing statistical information on attendees.
- Quality of the event held.

- Break even point.
- Media exposure.
- Invitation through email – Numbers as well as RSVP's.
- Survey's sent out or completed at event for feedback from attendees.
- Direct contributions back to the community, Chapter and/or University..

How can we demonstrate and record those successes?

- Determine 4 or 6 things that Chapters want to get out of the event.
- Involving Chapter volunteers more with the whole process.
- Technology/tools used for tracking the quantitative data. Such as Google Analytics, Cost-Benefit and break-even reports, Survey Monkey, Excel spreadsheets – graphs, charts, etc.

Succession Planning

Leadership renewal is the key to a successful Alumni Chapter. When considering long range growth and planning, it is important for the current president to identify a volunteer who will serve as his or her replacement as soon as they accept the leadership office. However, all alumni chapter executives are responsible for engaging new alumni for leadership roles and membership.

For all Chapters, a succession plan must be developed to ensure the continuity of the Chapter. Although the responsibility for creating such a plan generally lies with the president, it is the job of the entire alumni chapter executive to ensure that a strong succession plan is in place. Alumni Chapter Officers must be recruited and terms of office respected to ensure continued Chapter rejuvenation.

Retention and Succession Planning

The president's chief responsibility, and that of the other chapter executives, is volunteer management and succession planning. For the long-term health of the Chapter, it is vital that your leadership pay significant attention to succession management.

Discussing succession with volunteers on a regular basis is important. Each Alumni Chapter should always have prepared a list of key volunteers with identified positions, and plan with these volunteers what leadership roles they would like to undertake. Integrating this into your alumni Chapter plan, will ensure that you have potential alumni leaders and will help the volunteers to best understand the organization's structure and the opportunities available to him/her.

You may also find it helpful to work with the AALU staff to support a volunteer's succession within the Chapter

Consider taking these steps in order to maintain a strong volunteer base and ensure that future volunteer opportunities are met:

- Maintain records of volunteers, their contact information, interests and activities.
- Emphasize teamwork so that all volunteers feel supported and stay refreshed.
- Define volunteer positions so volunteers understand expectations.
- Recognize and acknowledge (informal / formal) the work of your volunteers.
- Share with the AALU staff outstanding work of volunteers and their activities.
- Thank volunteers in a timely and appropriate manner which is a crucial ingredient in retention and cultivation of leaders and helpers.

The infusion of new perspectives, ideas and energy are important to avoid stagnation and to encourage evolution into a mature organization. As such, it has been determined that holders of Alumni Chapter executive positions should not serve more than 2 terms of 2 years.

Recruitment

Cultivating your pool of alumni is important. The Chapter could draw on this pool to encourage more involvement within the chapter. Leveraging alumni events should also be used as a way of identifying and recruiting potential volunteers.

As part of the recruitment process, it is recommended to engage in some of the activities detailed below.

- In addition to working within the established AALU communication channels, Chapters should integrate social media platforms to encourage the widest range of volunteer outreach.
- Distribute handouts and a volunteer registration inviting attendees to indicate their interest to volunteer and update their contact information. Share this information with AALU staff so that information may be kept up to date and accurate for further outreach efforts.
- Ask the Chapter president to make public remarks about the organization and its activities at events, encouraging participation from the guests.
- If the attendance is appropriate, ask those attending to share information about themselves in a small group setting so that you and others may get to know more information about attendees and potential volunteers.
- Designate a point person at events to make new attendees feel welcome and introduce them to others.

- Identify new attendees on their name-tags at events.
- Promote alumni to join your social media platforms at your events and use social media to engage members or alumni who were unable to attend and encourage other attendees to do the same.

The Bigger Picture

Alumni Chapters could also be used as a recruitment tool for greater involvement within the AALU. Opportunities, within the AALU, should be promoted and discussed at all meetings and at other regular alumni events. Putting in place a 'strong pipeline' of volunteers not only helps sustain the chapter, but is also an integral part in supporting and developing the AALU.

Appendix I - Chapter Charter Request

We, the undersigned, have associated ourselves for the purpose of forming/maintaining a Chapter of the Alumni Association of Lakehead University.

This one-page document serves as a request to be chartered by the AALU, with full rights, privileges and responsibilities pertaining thereto.

The name of this organization shall be known as:

“The Alumni Association of Lakehead University,

_____ Chapter”

Scope

The territory of special interest served by this Chapter / Constituent Group shall be:

City / region: _____

or Academic constituency: _____

or Special interest: _____

Submitted by:

Chapter President

Date

The original copy of this document is to be forwarded to the Office of Alumni and Community Relations (address below), and approved copies will be returned to the Chapter President.

Lakehead University
Office of Alumni and Community Relations
955 Oliver Road
Thunder Bay, Ontario
P7B 5E1

Approval:

President, AALU

Director, Alumni and Community Relations

Appendix II – Chapter Memorandum of Understanding

PRO FORMA MEMORANDUM OF UNDERSTANDING BETWEEN THE ALUMNI ASSOCIATION OF LAKEHEAD UNIVERSITY AND CHAPTERS

Preamble

This memorandum of understanding is a good-faith agreement between the Alumni Association of Lakehead University (AALU) and its chapters for the purpose of delineating the responsibilities of the AALU and each AALU chapter to each other for their mutual benefit.

Agreement

A Chapter shall:

- ✓ Demonstrate that it is formed to promote the welfare of Lakehead University and its alumni by maintaining a mutually beneficial relationship;
- ✓ Organize and conduct itself in a manner consistent with the goals and mission of the University and the AALU; and be responsible for its own activities and guided by decisions of its governing bodies.
- ✓ Collaborate with the AALU to promote the interests and welfare of Lakehead University, to foster a spirit of camaraderie and participation among its members, and, agree to comply with the following:

Responsibilities and Expectations

1. Use of the Alumni Database

The Chapter commits to follow guidelines established for the use of this information as well as applicable Canadian and provincial confidentiality regulations.

The Chapter agrees to provide all information updates discovered through the use of the database to the Office of Alumni and Community Relations within 2 weeks of discovery, so that the central database can be updated.

2. Membership

Chapter membership shall be open to all individuals of the Lakehead University alumni community who have an interest in the welfare of the AALU and Lakehead University. Membership will not be restricted to any individual because of language, race, ethnic origin, gender, sexual orientation, disability or religion.

3. Chapter Name

The name of the Chapter shall be as follows:

The Alumni Association of Lakehead University, _____ Chapter

4. Financing

4.1 Taxable Donations:

The AALU and its chapters are not registered as charitable organizations and therefore cannot issue receipts eligible for tax credits.

4.2 Financial reporting:

A Chapter is required to present an annual financial statement and annual report of activities to the AALU and the Office Alumni and Community Relations. The fiscal year begins on May 1 and ends April 30. Year-end reports are required by July 1 of each year. The statement must also be made available to any bona fide Chapter member who requests the information. Under exceptional circumstances, the AALU may request an audit of a Chapter's finances. Such a request must be made to the Chapter and supported by majority resolution of the AALU Board of Directors. Please note that your future funding will be contingent on the submission of this report.

5. Use of AALU and University logos

Use of the AALU and University logos must comply with the visual identity program set out by Lakehead University. Any events that are held on behalf of a Chapter will have the Alumni Association of Lakehead University logo at all times on advertising and promotional materials as well as in plain sight in one form or another at said events.

6. Notice of Events

If an event is not a part of the Chapter annual plan, the AALU and the Office of Alumni and Community Relations are to be informed in writing with regard to upcoming events and activities at least one month prior to the event. A full description of the event, including content, locale, price and registration information is to be provided.

7. Confidentiality Clause

Lakehead University alumni records are confidential. Use of the list for any other purpose, including, but not limited to, reproducing and storing in a retrieval system by any means, electronic or mechanical, photocopying or using the addresses or other information contained in this list for any private, commercial, or political mailing is strictly prohibited and is in direct violation of copyright and constitutes misappropriation of corporate property. It is to be used by authorized personnel only and must be used only for the purpose indicated on the initial request. It must be kept in a secure place and once it has been used for its intended purpose it must be returned to the Office of Alumni and Community Relations.

8. Chapter Representative information

Chapter representatives will provide complete contact information that may be used on the AALU website.

9. General

The parties agree that the Memorandum of Understanding (MOU) between the University and the AALU is the document that defines the relationship between the AALU and the University. The parties further acknowledge that they have read the Memorandum of Understanding and in particular the covenants and obligations of the AALU contained therein. Chapters agree that they shall honour and perform all of the covenants and obligations of the Chapters contained in this Agreement. The Chapters further acknowledge and agree that the AALU shall not have any greater obligations with respect to Chapters than it has as a Party to the MOU with Lakehead University.

The AALU reserves the right to review and/or audit individual chapter operations as they deem appropriate. Both parties will also review and approve individual chapter board membership.

The AALU reserves the right to make amendments to the Chapter Handbook and the Chapter Memorandum of Understanding as they deem appropriate.

In the event a chapter is dissolved, all membership lists will be returned to the AALU.

Dated:

Chapter President

Alumni Association President

Appendix III – Chapter Committee Members and Roles

(Please print additional sheets as required; a minimum number of **6 members** is required for each chapter)

Name: _____

Chapter Role: _____
(i.e. President, Vice-President, Treasurer, etc)

Home Address: _____

Home Phone: _____

Business Information (Employer/Title/ Address/ Phone):

Email: _____

Name: _____

Chapter Role: _____
(i.e. President, Vice-President, Treasurer, etc)

Home Address: _____

Home Phone: _____

Business Information (Employer/Title/ Address/ Phone):

Email: _____

Name: _____

Chapter Role: _____
(i.e. President, Vice-President, Treasurer, etc)

Home Address: _____

Home Phone: _____

Business Information (Employer/Title/ Address/ Phone):

Email: _____

Name: _____

Chapter Role: _____
(i.e. President, Vice-President, Treasurer, etc)

Home Address: _____

Home Phone: _____

Business Information (Employer/Title/ Address/ Phone):

Email: _____

Appendix IV – Proposed Events for the Year

| Event | Description | Objectives of Event and Outcome | Expected Event Cost |
|-----------------------------|---|--|--|
| Networking Event (Oct 2014) | Guest speakers and community members will come to speak to students about how to network and the importance of networking | As this event is geared solely towards business students, we feel the success level is high due 600 business alumni in the area. Speakers providing opportunities that alumni desire will be the key to success. Providing knowledgeable and seasoned speakers will have a high impact on participants. Emphasis is put on advertising through social media accounts, word of mouth and brochures. | \$400.00 – This included facility rental, and food at event. Guest speakers were volunteers. |
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| | | | |

Appendix VI – Chapter Event Checklist

| Complete By (Date) | Task | Staff/Volunteer Responsible | Task Completed? |
|--------------------|---|-----------------------------|-----------------|
| | 6 MONTHS BEFORE THE EVENT | | |
| | Create timeline for event | | |
| | Research event location - visit possible locations | | |
| | Book event location | | |
| | 5 MONTHS BEFORE THE EVENT | | |
| | Prepare budget | | |
| | Secure sponsorship as needed | | |
| | Prepare announcement for the Lakehead Magazine and e-newsletter and send to Office of Alumni and Community Relations | | |
| | Prepare announcement for the alumni website and send to Office of Alumni and Community Relations | | |
| | Recruit and train volunteers as needed | | |
| | Assign contact person for RSVPs, create RSVP form (please remember that the Office of Alumni and Community Relations can assist by receiving RSVPs) | | |
| | 4 MONTHS BEFORE THE EVENT | | |
| | Ask Office of Alumni and Community Relations to post announcement on alumni website | | |
| | Select and contact a master of ceremonies (if required) | | |
| | 3 MONTHS BEFORE THE EVENT | | |
| | Draft invitation and submit to Office of Alumni and Community Relations for mailing/emailing | | |
| | Draft and confirm registration procedures | | |
| | Outline invitation list | | |
| | 2 MONTHS BEFORE THE EVENT | | |
| | Arrange for volunteer photographer | | |
| | Rent audio visual equipment (if applicable) | | |
| | Coordinate menu, parking, etc. with event venue | | |
| | Develop duty roster for event | | |
| | 6 WEEKS BEFORE THE EVENT | | |
| | Purchase or ask of Alumni and Community Relations for any necessary gifts for speakers/guests | | |
| | Send weekly registration updates to the Office | | |
| | 2 WEEKS BEFORE THE EVENT | | |
| | Create order of proceedings for the event | | |
| | Give venue a list of requirements | | |
| | Create table seating plan | | |
| | Create program for the evening and submit to Office of Alumni and Community Relations (Office may assist with this if required) | | |

| | | | |
|--|---|--|--|
| | Draft speeches or scripts | | |
| | Purchase decorations, flowers, etc. if needed | | |
| | Make follow-up phone calls to invitees who have not yet responded | | |
| | Confirm attendance number with venue | | |
| | Submit final RSVP list to Office of Alumni and Community Relations so that nametags can be prepared (Office may assist with this if required) | | |
| | DAY PRIOR TO EVENT | | |
| | Prepare event box (see example) | | |
| | DAY OF EVENT | | |
| | Set up site | | |
| | Set up registration/ reception desk | | |
| | Publicly recognize/thank sponsors, distinguished guests and guest speakers and all volunteers | | |
| | IMMEDIATELY FOLLOWING EVENT | | |
| | Process bill payments | | |
| | Write up 1-paragraph event summary for Lakehead Magazine | | |
| | Write any necessary thank-you letters | | |
| | Finalize/update event attendance list | | |
| | Prepare event report and budget summary for AALU | | |

Sample Event Box

- ✓ Table decorations
- ✓ Printed and blank nametags
- ✓ Plastic nametag holders
- ✓ Change of address forms
- ✓ Table seating arrangements
- ✓ Registration lists
- ✓ Lakehead tablecloth for registration desk
- ✓ Copies of Lakehead Magazine
- ✓ Prizes and gift wrapping
- ✓ Digital camera (if needed)
- ✓ Order of proceedings
- ✓ Programs
- ✓ Speaking notes
- ✓ Event documentation (contracts, contact information, etc.)
- ✓ Welcome Sign

Appendix VII – Social Media Toolkit: Alumni Chapters

Social media platforms, and the way they represent our university and alumni, are becoming more important. As active Chapter members and volunteers of Lakehead University's Alumni Association, we encourage your use of social media to publicize the Chapter objectives and events, as well as contribute to Lakehead University's online presence. Working together, we can be more impactful in brand and in content, presenting a coherent and comprehensive identity for Lakehead University and our Alumni Association.

As a Chapter, spend time reflecting on your goals for social media, because your objectives determine your channels and content strategy. For example, what information do you primarily want to share? What will your tone be? This will give all members a deeper understanding of your Chapter, and a foundation for the designated Chapter member(s) in charge of the social media accounts to work from.

It is important to always remember that your Chapter is an extension of Lakehead University, and you become the faces and voices of our Alumni, our current students, and the institution in general. Do not use Chapter accounts for personal reasons, including unrelated and/or inappropriate content. There are plenty of other options if you wish to have a private discussion with Chapter members. Exercise your best judgement when it comes to content you are creating and sharing, you are Lakehead University.

1.0 GOALS

Build a culture of engagement, involving people inside and outside your chapter in dialogue whenever possible. Chapters must be inclusive and inviting to all Lakehead University Alumni, and related individuals and organizations. The more members and opportunities, the better!

Promote social events. Drive enthusiasm, anticipation, registration, and networking within your region and among your fellow Alumni.

Boost recognition. The more active and engaging your social media presence is, and the more you amplify your mandate and mission, the more visible both your Chapter and Lakehead University will be to the public.

Resolve issues. Use social media to resolve problems and answer questions in a timely manner. As a general rule, a 60 minute response time is ideal but 6 hours is the absolute limit.

2.0 PLATFORM REGISTRATION

2.1 Facebook

45% of all social media interaction occurs on Facebook, and thus it is a requirement each Chapter be present on this platform.

- Once a Chapter has been approved, the Chapter will receive an email address and password from the Director of Alumni and Community Relations which the designated Chapter admin will then use to create a Facebook account. Sign up will require a first and last name, email, password, birthday, and gender.
- After a generic Facebook account is created, select “Create a Page”, found by clicking the gear in the top right corner of the Facebook homepage, and then “Company, Organization or Institution.”
- Next, select “Organization” from the drop-down menu, and in the “Company Name” box write “Alumni Association of Lakehead University [] Chapter”, filling in the blank with the Chapter location (ie. Alumni Association of Lakehead University Ottawa Chapter”). Agree to the Terms of Service and click “Get Started”.
- The next page is the Admin Panel, in which all content can be posted, managed, and measured. In addition to an email address, each Chapter will receive approved images to use as a profile picture and cover photo (the banner-type image across the top of a Facebook page/profile) which should be uploaded as soon as possible. To do this, mouse over these areas and click “Change Cover” or “Edit Profile Photo” and select the proper images.
- In order to add Chapter information, click “Edit Page” in the top right corner of the Admin Panel and then “Update Page Info”. Make the following changes under the “Page Info” tab.
 - **Address:** city and province
 - **Short Description:** Our Alumni transform the world through their exceptional and unconventional accomplishments.
 - **Long Description:** As Alumni of Lakehead University we are proud to be exceptional and unconventional partners in the success of our Alma Mater. We ENGAGE both students and graduate through events, chapters, recruitment, mentoring, and meaningful communication. We CELEBRATE our Alumni through a comprehensive awards and recognition program. We SHARE our time, talent, and treasure with the Lakehead community; and encourage others to do so through our actions as Leaders.
 - **Phone:** include a phone number the President can be reached at
 - **Email:** include the email used to set up the Facebook account, this will be the contact email for the Chapter
 - **Website:** www.lakehead.ca / www.lakeheadualumni.ca
- Admin are people who have the authority to access the “behind the scenes” of this page, or the Admin Panel, and are able to make changes. It is important that all Chapter members are authorized to do so. To add an admin, click the “Manage Admin Roles” under the “Edit Page” tab, and enter each email individually (note: the email entered must be the email through which they have set up their personal Facebook account). Click “Content Creator” and select “Manager” from the drop down menu for each admin, and click save. The new admin can accept the invite by going to **facebook.com/pages** and clicking “Invites” at the top. Depending on their settings, they may also receive a notification or an email and can access the invite that way.

- Make the following changes under the “Settings” tab.
 - **Page Visibility:** page published
 - **Posting Ability:** anyone can post to my Page timeline, anyone can add photos and videos to my Page timeline
 - **Post Visibility:** posts by others appear on my Page timeline
 - **Post Targeting and Privacy:** turn off privacy
 - **Messages:** people can contact my Page privately
 - **Tagging Ability:** other people can tag photos posted on my Page
 - **Notifications:** turned on
 - **Country Restrictions:** Page is visible to everyone
 - **Age Restrictions:** Page is shown to everyone
 - **Page Moderation:** no words are being blocked from the Page
 - **Profanity Filter:** turned on
 - **Similar Page Suggestions:** Include the Page
 - **Replies:** Turn on comment replies
 - **Merge Pages:** Merge Duplicate Pages
- After 25 likes, Admin will be able to claim a “Vanity URL” which is a customized web address. Visit facebook.com/username and walk through the wizard to choose the username. For consistency, we ask to utilize “AALU []”, with your location filling in the blank. Save.
- While all members should be able to edit the page, it is best if one member is in charge of all posts and changes so nothing is duplicated or missed. Discover what works best for your Chapter.

2.2 Twitter

- Once a Chapter has been approved, the Chapter will receive an email address and password from the Director of Alumni and Community Relations which the designated Twitter admin will then use to create a Twitter account. Sign up will require a full name, the email address, a password, and a username.
- The username is searchable, and it is what Twitter users will utilize to identify your account. To keep our Chapter accounts coherent, we ask your username to be AALU[location]. For example, AALUCalgary.
- The username will follow an “@” sign (@AALUCalgary) automatically. On Twitter, this symbol followed by a username represents an account. The utilization of this feature will be explained within section 3.2.
- Once signed in, click the “Me” tab in the top left corner of the homepage. This is your Chapter Twitter account. Click the gear image on the top right corner of this page, and then “Edit profile”. Click “Email notification” on the menu bar on the left, and select “My Tweets are

retweeted”, “My Tweets get a reply or I’m mentioned in a Tweet”, and also “I’m followed by someone new” and “I’m sent a direct message”. Leave everything else unchecked. These selections will send email notifications to the Chapter email when users interact with your Twitter content. Save changes.

- Under the “Profile” tab on the left, the account photo, header, name, location, website, and bio can be edited. Save all changes once completed.
 - The Director of Alumni and Community Relations will send an approved photo, header, and background for the account.
 - Name: Alumni Association of Lakehead University [] Chapter
 - Location: Where you are
 - Website: <http://www.lakeheadualumni.ca/>
 - Bio (Association Vision Statement): Our Alumni transform the world through their exceptional and unconventional accomplishments.
- Under the “Design” tab, upload the designated background and adjust the settings accordingly. Change link colour to #173cd1. Save changes.
- To keep content and tone consistent and regular, it is best if there is only one administrator in charge of the Chapter’s Twitter presence.

2.3 LinkedIn

- Like Facebook, each Chapter is required to have a LinkedIn presence.
- Creating a Chapter page on LinkedIn is different from other social media platforms because the creator must have an active profile before creating a branded page. Specifically, the administrator should already have over 10 Connections, a profile that is at least 50% complete, and belong to a number of groups.
- This administrator must mouse over “Interests” at the top of the homepage and select Groups. Click the yellow “Create a group” on the right and fill in the requested information.
 - Use the logo that will be provided (JPEG or PNG).
 - Summary: Our Alumni transform the world through their exceptional and unconventional accomplishments. Our mission is to provide a supportive Alumni Community where our members have opportunities to engage, celebrate, and share.
 - Description: As Alumni of Lakehead University, we are proud to be exceptional and unconventional partners in the success of our Alma Mater. We ENGAGE both students and graduates through events, chapters, recruitment, mentoring, and meaningful communication. We CELEBRATE our Alum through a comprehensive awards and recognition program. We SHARE our time, talent, and treasure with the Lakehead community; and encourage others to do so through our actions as Leaders.
 - Under “Access” ensure “Request to Join” is selected and the first two check-boxes are checked. Additionally, feel free to send a Twitter Announcement! This is a great example of cross-platform promotion and how it can enhance awareness and engagement.
- Select the geographic location your Chapter is in
- Read through the Terms of Service and agree to them
- Click “Create a Members-Only Group”

- Invite people to your Chapter Group by selecting the group within the “Groups” tab, click “Manage”, and then “Send Invitations” on the left. Invite users by typing a connection’s first or last name, utilizing your address book icon, or add their email address(es).

2.4 Instagram

- Download the free Instagram app at the Apple App Store
- Select “Register” and fill in a username and password. For this platform, we also ask you to use “AALU[location]” as a username. If it is taken, notify the Director of Alumni and Community Relations immediately. For the profile picture, use the same one that was provided for Facebook and Twitter.
- Next, fill in email, name (Alumni Association of Lakehead University [location] Chapter”, and exclude the phone number option. Click done.
- Once signed in, the far left icon at the bottom will bring you to your profile, and allow you to edit.
 - Website: <http://www.lakeheadualumni.ca/>
 - Bio: put something short, such as “Welcome to Lakehead University Calgary Chapter’s Official Instagram.”
 - Privacy: set posts to public. Save
- Click the gear at the top right corner of the profile page and scroll down to “Preferences” and select “Share Settings”. Connect the Chapter’s Facebook and Twitter by following the prompts. This will allow the sharing of Instagram photos across platforms if desired, however, this will be touched on further in section 3.4.
- Like Twitter, it is best if one administrator looks after the Chapter’s Instagram presence

While Facebook and LinkedIn are the only two platforms required to be used, there are a number of social media platforms that can be utilized efficiently for your Chapter. For example, if your Chapter has agreed a WordPress blog, Flickr page, or Tumblr site may be an acceptable third platform, let the Director of Alumni and Community Relations know so you may discuss usability and content details.

3.0 USAGE

3.1 Facebook

- Share content using the status update box
- Copying and pasting links into statuses will be accessible for the viewer, and a preview of the page will accompany this post. Previews are easily removed by clicking the “X” in the corner, however, the link will still be accessible.
- Add saved photos and videos to a post by clicking “Add Photos/Videos” beside the “Update Status” button.
- You can like, comment on, and share posts from within your network, but unless totally relevant, it is best to keep your Chapter account exclusively as an information provider.
- Using a hashtag in posts will turn topics and phrases into clickable links. This helps people find posts about topics they’re interested in. To utilize a hashtag, write # (number sign) alone with a phrase written as one word, for example, “Had a great time at our Alumni event tonight! **#bowling**”. When a hashtag is clicked, a feed of posts that include that hashtag will come up. Additionally, hashtags are searchable using the search bar at the top of any Facebook page.

- Creating and using a Chapter-specific hashtag is a great way to catalogue relevant images and posts not only from the Chapter page, but also from members that may be posting about the Chapter as well. For example, “Had a great time at our Alumni event tonight! #bowling #AALUCalgaryChapter”. This will catalogue the post within the bowling tag, as well as the AALUCalgaryChapter. Encourage members and event attendees to use the hashtag on pertinent posts, and a simple search of it will bring up all kinds of Chapter-related content.
- Engage with users that comment on posted content and/or send personal messages. Admin will receive notifications when these things happen.
- If a user writes something nasty on the Chapter’s Wall, respond with a solution and handle it with grace. If it is extremely inappropriate, including swears, deleting it may be the best option.
- To create a photo album, select “Photos” on your profile, and click “+ Create Album” in the top-right corner. Select all the photos to be placed in this album, add captions, name the album, and publish. Tag people in the photos by selecting “Tag Photo” on each image, click the person(s) within the photo, and type their name(s). Any photo or album can be edited and deleted at any time.

- **3.2 Twitter**

- Messages on Twitter are called “tweets” and can be created by typing within the “Compose new Tweet” box on the left of your Twitter newsfeed (“Home”). There are only 140 characters to work with, so be succinct but try not to use short forms!
- Links to webpages can be copied and pasted within a tweet and will be active, however it is usually shortened. Include saved pictures and videos by clicking “Add Photo” within the tweet box. This will embed the media within the tweet as a link. The link counts toward your 140 character limit so keep an eye on the length of your text.
- Your newsfeed is a personalized collection of tweets sent out by the people/brands you follow. You can engage with these tweets by replying, mentioning, retweeting, and favouriting.
 - **Reply:** click reply. This will start a tweet that begins with the account username you are replying to. Starting a tweet with the account name (such as, @LakeheadUniversity) will send the tweet to only that user, or multiple users if you include multiple accounts, and will only show up on their newsfeed(s). Despite this, it will still be viewable on YOUR personal Twitter page for the public to see. In short, replies are still public, but show up only on the timeline of the user(s) you start the tweet reply with. For example, “@LakeheadUniversity Thank you for your hospitality this weekend!”
 - **Mention:** a mention is when you include one or many twitter accounts within a tweet, for example “Had a great time today touring @LakeheadUniversity with @AALUOttawaChapter and @AALUCalgaryChapter”. Unlike a reply, this tweet would be broadcasted to all of your followers because it does not begin with the account names, and is therefore not targeting them specifically.
 - **Retweet, or RT:** click retweet. This will broadcast that user’s tweet on your own account, and therefore to all of your followers. For example, if Lakehead University

tweeted about a call for 50th Anniversary volunteers, you may wish to retweet this to your followers.

- **Favourite:** click favourite. This keeps track of tweets you find interesting. They can be seen under the “Favourites” tab on your profile page.
- Clicking the “@ Connect” tab on the top left of any Twitter page will bring you to a record of who has interacted with your account, in the form of follows, favourites, replies, mentions, and retweets. Feel free to thank users for following your Chapter page!
- Just as hashtagging is used on Facebook, it is extremely popular on Twitter. Use your Chapter hashtag to build a collective snapshot of what people are saying about the Chapter. Use the search bar to discover these tweets.
- Trends are hashtags (topics) that are trending, or extremely popular, within a given timeframe. You can change the location of trending topics by clicking “Change” and selecting a location. If a relevant trend, such as Lakehead University, pops up, feel free to jump in on the conversation.

3.3 LinkedIn

- Within your Chapter group, start discussions on your page by utilizing the status bar, similar to Facebook. Members can comment, like, and follow the discussions.
- Group members, not just Admin, can also post discussion material. Encourage this!
- Under the “Promotions” tab are articles or posts shared by members of the group. Anything that is shared is defaulted under the Promotions tab to prevent spam on the main page. It is possible to flag this material as a job, or as inappropriate, by clicking the “Flag” drop-down button within a post.
- Flagging a post as a job will put it under the “Jobs” tab, and will be accessible to all group members.
- To send an announcement, such an event reminder, click “Send Announcement” under the “Manage” tab and enter your subject (up to 200 characters) and Message (up to 4000 characters).
 - By default, announcements are sent as an email to members and also posted as a featured discussion within the group.

3.4 Instagram

- Access your homepage, user and hashtag search, interactions (likes, follows, mentions), and profile along the bottom of the screen.
 - Your homepage is like a Facebook or Twitter newsfeed, showing photos the accounts you follow are posting. Feel free to “like” and comment on these.
 - Search for a user or track a hashtag (such as your own Chapter-centric one!) by clicking the compass tab and utilizing the search bar.
 - The heart tab will show you not only who is interacting with your content and profile, but also what else your followers are interacting with.
 - The tab furthest to the right will bring you to your profile, where you can view your posts and edit your profile.
- Like Facebook and Twitter, hashtags are commonplace and will make your content easier to find.

- To post a photo, press the very centre button. This will allow you to take a photo in real-time, or select a photo from an album on your phone to upload.
 - Once you have done either of these actions, press next. This will bring you to an option to add a filter (a colour enhancing/distorting effect) to your photo. You can also rotate your image, frame it, and make it blurry within this selection. Do not distort your images too much; all-natural is the way to go! Press next.
 - Before sharing your photo with your followers, include a short caption complete with hashtags. Tag other users using the “Tag People” option or writing their usernames using the “@” symbol just like Twitter. “Add to Photo Map” will give you the option to tag your location, which is beneficial when at an event.
 - Press the blue “Share” button to upload the photo to Instagram only. To upload to Facebook and/or Twitter as well, select these options before sharing. This will prompt you to connect your platforms, so it is crucial to fill in the information for your Chapter accounts and not your personal accounts. **Your followers will probably follow you on multiple platforms, so share an Instagram photo to two or more social media accounts very sparingly. No one wants to see the same image multiple times!**

4.0 CONTENT

Be human. Don’t use these platforms to “sell” the Chapter, instead focus on establishing a real connection with your followers and use language everyone can understand.

Be transparent. Let your followers know exactly what is going on amongst the Chapter, sharing details and opportunities to get people aware and involved.

Stay focused. Your Chapter is an extension of Lakehead University and its Alumni, therefore your best judgement must be exercised when it comes to relevant content. If you have any questions about content, contact the Director of Alumni and Community Relations.

The following are examples of content that are acceptable on all platforms:

- Event promotion
 - And follow up! Upload event photos to Facebook, or live-tweet an event.
- Milestone reporting, including updates and progress reports.
- Lakehead University news and publications.
- Promotion of donation and volunteer opportunities.
- Contests
 - Give away concert or game tickets, gift certificates, etc. to Chapter members, the general public, or sponsors. It could be a photo contest, or something totally original. Get creative with your requirements and pump out that user-generated content!
- Include a photo or visual of some kind whenever possible.
 - According to Trend Reports, between 65% and 85% of people describe themselves as visual learners. Post an image with your text in order to capture your audience’s attention and allow them to absorb your information quickly and easily.

Get creative and have a sense of humour! Share information in a way that appeals to your followers and holds their attention.

5.0 GATHERING AND INTERPRETING DATA

Collecting data from your social media site(s) can help you discover trends and information about your audience in order to interact with them more effectively. While you are not selling a product or targeting a highly specific segment of the population, understanding how your engagement impacts users is important in leveraging your, and Lakehead University's, social media presence.

5.1 Facebook

Facebook has a built-in analytics to help you measure and collect data. The information is located on the Admin Panel at the top of your page regarding total reach for each post. Clicking "See Insights" in the top right of your screen will reveal more in-depth measurements of your audience engagement, including statistics relating to page likes, page suggestions, post reach, visits broken down by tab, and fans segmented by gender, location, and language. There are more features you can explore and leverage by becoming more familiar with these insights.

5.2 LinkedIn

LinkedIn also has integrated features that can help you track your social success. To access this information, go to your admin page and click "Follower Insights" or "Page Sights". Apps on sites like SimplyMeasured can provide you with a closer look at your statistics, but they require access to your account information.

5.3 Twitter

While Twitter does not have built-in analytics, there are a variety of free tools online that will help you measure your engagement. A simple Google search will pull up helpful tools such as Twitonomy, Tweetlevel, and Twittercounter, to name a few. Like SimplyMeasured apps, they require access to your account information.

5.4 Instagram

Instagram, like Twitter, does not provide an integrated measurement tool, but apps like Instafollow can help your record your analytics.

5.5 Google Analytics

Google Analytics is a great tool for all other online interaction, including blogs and websites that do not have integrated measurement. Simply sign up and embed the provided code within your website in order to keep tabs on engagement. Similar to Facebook Insights, Google Analytics provides a very comprehensive snapshot of your online influence and engagement.

Appendix VIII – Office Responsibilities

OFFICE OF ALUMNI AND COMMUNITY RELATIONS (the Office) Chapter Support and Responsibilities

1. Primary point of contact for Chapter Organizing Committee (COC) and/or Chapter President
 - a. The Office will coordinate communication between President, Board, Executive, and respective Board Committees.
 - b. Designed to maintain an open dialogue, not to prevent. There has to be a consistent message. Individual Board members cannot speak for the entire Board with authority.
 - c. Office staff to manage requests of the Chapter so that the right hand knows what the left hand is doing.
2. Financial Management
 - a. Office manages day to day financial transaction of the Chapter.
 - b. Office signs contracts, pays deposits and invoices, orders items on behalf of the Chapter.
 - c. Only the University has legal standing (in order to sign contracts)
 - d. Association utilizes the University's Accounting system and as such has access to PO's, billing, and corporate credit cards through staff of the Alumni and Community Relations Office.
 - e. Board is responsible for assigning an envelop of funding from which the Chapters can determine their yearly event plan. Additional requests can be made for "one-off" funding for special events or circumstances.
3. Social Media/Web/Email Accounts
 - a. Office is responsible for setting up a "@lakeheadu.ca" email address for the Chapter.
 - b. This email address will be shared with designated COC members, but login and password information will be maintained by the Office.
 - c. The Office will set up social media accounts on behalf of the Chapter, and will share administrative duties for these accounts with a designated member(s) of the COC.
 - d. The Office will assist the Chapter in posting information and events to the main Alumni Website, general Alumni social media accounts, as well as accounts specific to the Chapter.
4. Events
 - a. The Office will be responsible for pulling lists of alumni for electronic and hard copy distribution of invitations, etc.
 - b. The Office will prepare hardcopy and electronic event invitations.
 - c. The Office will handle mailing of hardcopy invitations.
 - d. The Office will send electronic invitations via an online registration and payment system (Attend.com). Chapters will be assigned a non-administrator account on Attend.com, so that they can view registrations for upcoming events.
 - e. The Office will sign event contracts, pay deposits and invoices.