

**Chapter + Affinity
Group Leader Guide**

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This document will be your guide in all areas of Case Western Reserve University chapter management, administration and assistance in programming development.

Strong chapters and affinity groups that promote the university are vital to the success of CWRU. We are proud to have a long tradition of global support from our alumni.

Overview

The Alumni Association of Case Western Reserve University connects more than 110,000 alumni through regional and international chapters, special events, alumni publications, social media and more. The Alumni Association encompasses alumni from all of the university's schools providing opportunities for every alumnus to develop and maintain a lifelong relationship with the university and with each other.

The Alumni Association, in its current form, was founded in 2006 and is advised by an [18-member board of directors](#). The Alumni Association staff and board focus on driving the university forward through alumni engagement.

Why Alumni Chapters and Affinity Groups?

Alumni chapters and affinity groups are imperative to engaging alumni around the world and serve as resources to keep them involved after graduation. Alumni chapters and affinity groups strive to do the following:

- Provide a means to connect alumni to the university and to each other based on geographic location and shared interests.
 - Create and promote programming for alumni to attend in their local regions or on campus.
- Support and advocate for all other programs and initiatives involving The Alumni Association, including homecoming, summer send-offs and affinity partnerships.
- Assist in succession planning to assure continuity in the chapter and affinity group leadership.
- Endorse university [fundraising campaigns](#) in support of Case Western Reserve University.
- Assist alumni in keeping their information up-to-date by notifying The Alumni Association and promoting the alumni directory, [CWRU Connect](#).

Alumni Chapters, Affinity Networks and The Alumni Association Staff Directory

Looking for a fellow chapter or affinity group leader? Need help from an alumni association team member? Follow the links below for more information:

- [Alumni Chapters by Region](#)
- [Alumni Affinity Groups](#)
- [The Alumni Association Staff Directory](#)

Expectations

The Alumni Association sets forth the following expectations for alumni chapters and affinity groups:

- Each alumni affinity group maintains its own board and committee structure.
- Each regional chapter has its own leadership structure. Although not a requirement, chapters are encouraged to maintain the following roles and commit to a two-year volunteer term: chapter president, events coordinator and communications coordinator.
 - **President:** The leader of the chapter, primary liaison to The Alumni Association staff and local alumni.
 - **Events Coordinator:** Primary local contact for the planning and execution of [events](#).
 - **Communications Coordinator:** Spearheads promotion efforts in conjunction with The Alumni Association.
 - Use and promote [CWRU Connect](#).
 - Assist in maintaining social media that adheres to [university guidelines](#).
 - Contact The Alumni Association staff for administration access to CWRU Connect and social media pages.
- Organize local events, striving for at least one annual event. Most chapters and affinity groups propose calendar events through planning meetings/conference calls.

- Chapter and affinity group leaders encourage fellow alumni to attend events. This can be done through personal contact (via [CWRU Connect](#)) and sharing social media posts.
- Cultivate a local pool of alumni volunteers interested in becoming future chapter or affinity group leaders.
- Communication within the chapters, affinity groups and with The Alumni Association.
 - Chapter leaders participate in bi-monthly conference calls.
 - Affinity group leaders participate in calls every other month and committees meet or call on an as-needed basis.
- Submit nominations for the annual [Alumni Awards](#).
- Adhere to timelines set forth by The Alumni Association for event planning and communication purposes.

Chapters and Affinity Groups can expect the following from The Alumni Association:

- Marketing & Communications support
- Financial support
- Assistance in hosting events by university and The Alumni Association staff members
- Support and guidance for growing chapters and affinity groups
 - Help and/or follow-up with planning meetings
- Event coordination support
 - Registration platform
 - Contract/payments submission with the university
 - Post-event survey and follow-up with the chapter
 - Giveaways

Leadership Tips for Chapters + Affinity Groups

Strong local leadership is the key to a successful chapter. To ensure your leadership team is the best it can be, here are a few tools and tips you can use:

- **Balance your communications between in-person, over-the-phone and electronic.** Email is an effective communication tool, but it's not a replacement for the occasional in-person meeting, which helps local volunteers reaffirm their commitment to the group.
- **Encourage open dialogue about how involved each leader wants to be.** No two alumni have the same amount of time to give, so make sure you're having open conversations as a leadership team about who has the time and interest to do what.
- **Constantly recruit new volunteers and leaders!** Every event you host is an opportunity to talk about being a local leader and to offer new alumni a chance to get involved and make their chapter better.
- **Utilize resources at The Alumni Association.** The staff is always available to discuss ways to increase engagement and participation.
- **Talk with other leaders.** Every group has something it can learn from another chapter or affinity group, so make the most of network opportunities such as regular conference calls and reaching out to leaders directly.
 - [Alumni Chapters by Region](#)
 - [Alumni Affinity Groups](#)
- **Start by asking alumni to volunteer for a single project or event.** Committing to being a chapter leader can sound daunting, but helping with an event or Facebook page is a defined and manageable commitment. Once a new volunteer's project is complete, ask them to help with another. Be sure to thank them along the way!
- **Discuss the importance of local volunteers to CWRU.** Local volunteers foster valuable relationships within the CWRU community and help drive CWRU forward.

Volunteer Opportunities

Alumni volunteers play an invaluable role in everything from recruiting new students to planning alumni events around the world. Whether your interests lean toward advising students, admissions and recruitment, assisting with regional programming, or helping the community, there are many opportunities for you to get involved.

Talking about volunteer opportunities at events is a great way to engage in conversation about getting involved with the university.

[Learn More >](#)

The Alumni Association Board of Directors

Local Chapter Involvement

Alumni Admission Ambassadors

Alumni Career Network

Career Connections

Cleveland-area Opportunities:

Summer on the Cuyahoga

International Friendship Program

Maltz Performing Arts Center

think[box]

School-Based Volunteering

Event Planning

What is our goal in hosting events?

- Engage alumni by providing networking opportunities, maintaining a connection to CWRU, encouraging chapter or volunteer involvement and creating meaningful, educational experiences.
- Provide a diverse array of programs to encourage alumni with different interests to participate.
- Support the long-term success and vision of your chapter and group by connecting with alumni and recruiting future leaders.

Where do I start?

- We encourage hosting an annual planning meeting to organize a calendar of events 6 – 12 months in advance for your chapter or network.
- The Alumni Association staff liaison is available for help with planning events.
- Types of events include educational or programmatic, social or cultural. Contact The Alumni Association staff liaison and other chapter or affinity group leaders for ideas of what has been successful for area alumni.

Who should be sending out event communications?

- The Alumni Association
 - Promotional emails are sent for each event, and will coordinate distribution with respect to other campus email communications. The Alumni Association cannot legally share alumni information with chapter or affinity group leaders.
- Communications Coordinator
 - Create and share social media posts about the event.
 - Promote events by sending chapter or affinity group-wide messages through [CWRU Connect](#).
 - Contact The Alumni Association staff liaison to gain administrative access for sending chapter-wide emails through CWRU Connect.

- All email must be approved by your staff liaison 48 hours prior to distribution.
- The Alumni Association reserves the right to ensure outgoing messages are brand compliant and follow university standards.

What questions should I ask when speaking with event coordinators from various venues?

- It's important to identify the following during initial conversations: available dates and times, address of venue, cost, venue contact information, venue capacity, availability/charge for parking, whether a contract is required and if there are any unique experiences we might be able to provide to our guests (e.g. behind-the-scenes guided tour).

What does The Alumni Association handle, versus what I can take care of on my own?

- The Alumni Association is here to help as much or as little as each chapter or affinity network prefers.
- When it comes to financial obligations, such as payments or contracts, your Alumni Association staff liaison must be involved, and will have final say over the contribution the university can provide.
- The Alumni Association staff liaison will call your venues/caterers for a final check of all details to ensure all is set for a successful event.
- Confirmation emails, reminder emails and post-event emails/surveys will be customized. The Alumni Association can also provide university talking points to be presented by the staff liaison or chapter or affinity network leader.

What do I do before the event?

- Planning should take place at a minimum, 8-10 weeks out from the potential event date (planning should take place during planning meetings).
- Communicate with the Alumni Association staff liaison regularly to ensure event details are clear.
- Leadership should, if attending, be the first to sign up for the event to encourage others to attend.

- The Alumni Association will ideally begin marketing 4 - 6 weeks prior to an event based on contract or communication timelines. If there are specific details you'd like to include, it's important to communicate these expectations well in advance.
- Chapter and affinity network leaders can help promote events via social media.

What do I do during the event?

- If an Alumni Association staff member is not traveling to your event, a box of materials will be sent to chapter or network leaders a few days in advance. Typically, this package contains nametags, registration list and giveaways (CWRU swag).
- Please allow plenty of time to set up and be prepared for early arrivals.
- At the event, remember that you are serving as a CWRU ambassador. Take a few minutes to welcome everyone. Talk about volunteer opportunities, upcoming events and applicable university updates (talking points to be provided by The Alumni Association).
- In the event that registration money needs collected for anyone that registers at the door, a check made payable to Case Western Reserve University or cash can be collected and sent to your Alumni Association contact for processing after the event.

What do I do after the event?

- Return final invoices/receipts and a list of attendees to The Alumni Association with attendees and walk-ins appropriately marked.
- Send photos to your Alumni Association liaison or ask the Communications coordinator to post to social media channels.
- In the event that registration money was collected, please send it directly to your Alumni Association contact for processing.
- Additional giveaways and blank nametags can be saved for the next event.
- The Alumni Association will send a feedback survey shortly after the event. Once The Alumni Association receives the attendee list and any other post-event documents, survey results can be sent to chapter and affinity leaders for review.

Chapter + Network Marketing Resources

Email Request Policy

The Alumni Association protects alumni contact information and cannot legally share private information. The Alumni Association reserves the right to ensure that outgoing messages representing the university are brand compliant and appropriately planned with respect to other campus email communications.

Mailing Requests:

Physical mailers are reserved for special occasions such as Presidential events and expectations should be discussed with your Alumni Association staff contact.

Use of the CWRU and Alumni Association Logos

The university logo is the strongest link to our brand. That is why it is important to use only approved logos in all communications. Please refer to the [University Marketing & Communications branding policies](#).

Because of the importance of this, The Alumni Association requests that chapters and networks request permission to use university logos and allow an Alumni Association staff member to ensure that the logo is being used in compliance with the university brand standards.

Chapter + Affinity Network Facebook Pages

The Alumni Association advocates each chapter and affinity network maintaining a Facebook page in partnership with their Alumni Association staff liaison. We will start the page for you to ensure it meets our university standards and grant access if you are new to your chapter or network. We suggest at least one Alumni Association contact and the [Communications Coordinator](#) is designated as “admin” on each page to ensure both sides of our partnership receive adequate visibility to page performance and roles. [Please refer to social media guidelines](#).

Chapter + Affinity Group LinkedIn Group Pages

[Join The Alumni Association LinkedIn page](#)
[Japan Alumni Chapter LinkedIn page](#)