

# Alumni Chapters Manual

Rev. Jan. 17, 2019

# **Welcome to the Alumni Chapters Program**

The Cal Alumni Association's Alumni Chapters program is a national grassroots program for alumni of UC Berkeley to connect with one another, engage with the Cal Alumni Association (CAA), and stay connected to the university through leadership and volunteer opportunities, student outreach, local events, social and professional networking, and philanthropy. The Alumni Chapters program has the unique ability to engage a wide breadth of alumni—both geographically and demographically—while at the same time building a network that celebrates and supports CAA and the university. By volunteering time, energy, and talent in this program, you and your chapter's board members play an essential role in CAA's central mission to support and serve our alma mater.

# Cal Alumni Association Strategic Plan

CAA's 2018–2022 Strategic Plan is guided by the alumni association's updated vision that “all Cal alumni worldwide are connected and actively engaged with UC Berkeley for life.” Our focus is to foster meaningful alumni engagement and chartering timely, relevant initiatives to support our continued growth and enhanced service to our alumni and our alma mater.

The Alumni Chapters program will also support the six Core Strategies set forth in CAA's Strategic Plan:

1. Prioritize high-yield alumni engagement activities that target key alumni market segments, supported by a data-first mindset.
2. Serve as the hub that connects alumni to each other and to the multiple facets of our alma mater.
3. Ensure all Cal alumni are aware that CAA aims to reach, serve, and engage all alumni of UC Berkeley.
4. Orient CAA as an indispensable partner with campus in building coordinated relationships with alumni.
5. Demonstrate to current students, during key milestones in their student life cycle, that CAA and the alumni community are important catalysts and partners in their success.
6. Pivot resources toward current and new revenue businesses that can produce the highest yield in financial ROI while also building alumni engagement.

[Read the full 2018–2022 strategic plan.](#)

# Program Overview and Tools

The Alumni Chapters Program helps Cal alumni create communities whose purpose is to enhance the university and connect alumni to each other, the university, and the Cal Alumni Association (CAA). Below, you will find key elements of the program, helpful information to create and sustain a chapter, and ideas for fulfilling your services to Cal. Chartered Alumni Chapters are officially registered with CAA and can access these tools.

## Alumni Chapter Structure

Alumni Chapters are encouraged to structure their alumni boards and bylaws to best fit the needs of their constituents. However, CAA has requirements and recommendations that all board members should be familiar with regarding board members and board structure.

## Board Members and Structure Requirements

- A minimum of one primary contact person and three board members must be Cal alumni.
- All board members must be dues-paying annual or life members of CAA.
- Maintain the minimum bylaws provided by CAA in the Alumni Chapters Manual.
- Regular elections for all chapter leadership and board member positions, as defined in bylaws.
- All board members must be responsive to inquiries from interested alumni, staff, and students.
- Follow the expectations outlined in the Alumni Chapters Manual and the Volunteer Handbook.
- Alumni Chapter leadership must conduct at least two board member meetings per year.

## Officer Structure

To keep the members of your chapter interested and motivated, CAA suggests the following board positions. The position functions are more important than the titles. Your chapter might need more or fewer positions, depending on your level of activity

Ensure tasks are delegated—it is likely that burnout will happen if only one board member attempts to fulfill all roles. CAA recommends defining term limits in your bylaws for leadership positions to allow for increased involvement of all chapter members.

Please notify your Alumni Chapter Advisor as soon as possible after any leadership transition and complete our [board member update tool](#).

The primary contact and at least three board members must be Cal alumni. All board members must be dues-paying members of CAA.

**President (or equivalent):** Oversee chapter development and financial health, manage chapter officers, and serve as liaison to CAA.

**President Elect (or equivalent):** Assist the President with chapter management. Member in this position has potential to become next President.

**Treasurer (or equivalent):** Maintain accounting records, which include expenditures, revenues, and reimbursements.

**Membership (or equivalent):** Generate ideas to attract new members, retain current members, and maintain accurate record of membership to be submitted to CAA in March each year.

**Communication/Website Master (or equivalent):** Update and maintain chapter website, social media, printed materials, flyers, e-newsletters, etc.

**Secretary (or equivalent):** Maintain chapter records, including bylaws, event calendar, communication to members, and meeting minutes.

## Officer Succession

Board member positions need to rotate to keep your chapter healthy and prevent leader burnout and the slowing of events, ideas, and programs. Traditions should be maintained, but change is necessary to keeping your chapter vibrant and dynamic to new and current members alike.

### Helpful Tips

- Hold elections at the same time every year. Do not allow one person to stay in a position year after year without a member vote.
- Plan for transitions:
  - An outgoing leader may wish to mentor an incoming leader through a portion of their term in a leadership role.
  - Elect a President Elect
  - Set term limits. We recommend two- to three-year terms for all officers, however, officers may transition each year or on different cycles as needed.
- Delegate major event and program planning to chapter members (non-officers, new members) with the intent they will become leaders or officers. You may also consider delegating tasks to former officers. Form committees of chapter members to support.
- Define your officer structure, volunteer job descriptions, term limits, and succession in bylaws.
- Encourage members to be involved in organizing or volunteering for programs and events.
- Survey the interests, skills, and resources of your members. Identify whom to turn to for help.
- Host an event with members to discuss new ideas.
- Evaluate your events to gauge success.
- Focus efforts on programs that are sustainable through leadership transition.

## Minimum Bylaws

Bylaws can provide structure and purpose to your alumni chapter and enable the chapter to maintain itself over time. Below are required elements of structurally sound bylaws:

**Name:** [insert Chapter Name], a chartered alumni chapter of the Cal Alumni Association (CAA).

**Purpose:** The purpose of this chapter shall be to join local University of California, Berkeley (UC Berkeley) alumni together in organized efforts to benefit the members of the chapter and UC Berkeley, in accordance with the provisions stated in the Alumni Chapters Manual.

**Officers:** The chapter shall have a governing board consisting, at a minimum, of the duly elected board members of the chapter: President, President-Elect, Secretary/Membership Chair, Treasurer, and

Communication Coordinator. The primary contact and at least three board members must be Cal alumni, and all board members must be dues-paying members of the Cal Alumni Association.

**Meetings:** Regular meetings shall be held [insert time frame].

**Term of Office** The chapter will hold annual elections of board members. The term of office shall be limited to two consecutive terms of [insert time frame] each.

**Voting:** A majority of board members constitutes a quorum. Passage of a motion requires a simple majority.

**Membership:** All UC Berkeley Alumni and friends of the university are eligible for membership in the chapter.

**Dues (optional):** Each member of the chapter will be assessed annual dues of [insert dollar amount] each year.

**Amendments:** These bylaws may be amended by a two-thirds vote of the chapter membership at any meeting. A change in the bylaws must be submitted to the Cal Alumni Association in writing for approval.

**Date/Signatures:** Date of approval by the chapter officers, including signatures of President and Secretary.

## Chapter Mailing Address & Bulk Mailing

### Usage of CAA's Mailing Address

CAA's mailing address cannot be used for your alumni chapter communication, including bank statements, newsletters, and collection of your chapter membership dues. CAA cannot accept mail or monies on your behalf. If using a personal address of a board member is not an option, we suggest opening a local P.O. Box, which can provide continuity as leadership changes.

### Bulk Mailing (and using CAA's nonprofit mailing permit)

As a chartered alumni chapter, you have the ability to use CAA's nonprofit indicia for bulk mailing purposes. While bulk mailing is less expensive, the process can be cumbersome. The delivery of your pieces can take 4 to 6 weeks. The mail must be dropped off in person at a post office that accepts bulk mail and they may request you to sort it by zip code. The indicia must appear in a particular way with specific information.

Your alumni chapter must calculate the approximate amount of bulk postage needed before mailing so CAA can add money to our checking account with the post office. The post office will not mail your pieces unless there is sufficient money prepaid.

Please allow 2 weeks for CAA to add money to our postal account. In order to qualify for these funds, your alumni chapter must apply and be approved through our [Alumni Chapters Grant Program](#).

For more information, go to [usps.com](https://usps.com) and type "indicia" in the search box.

Whether or not you use the bulk mailing service, we recommend using CAA's mailing house, [First Class Plus](#), for the printing and addressing of your print pieces.

## Dissolution of Charter

Running a CAA-chartered alumni chapter requires the efforts and cooperation of multiple board members to be successful. As with any volunteer-run organization, there can be challenges with leadership succession, community engagement, and burnout.

The Alumni Chapters staff understands that challenges occur and affect your chapter's ability to maintain a charter and engage your alumni community.

Your charter is renewed annually in January as long as your alumni chapter has fulfilled its charter responsibilities for the previous year.

Your alumni chapter can decide at any time to dissolve your charter with CAA.

CAA reserves the right to dissolve your charter if your alumni chapter does any of the following:

- Does not fulfill your charter responsibilities.
- Violates the guidelines within the Alumni Chapters Manual and/or the [Volunteer Handbook](#).

If your charter is dissolved, the following policy and guidelines need to be followed:

- “Cal Alumni Association,” “CAA,” and the CAA logo cannot be used in your chapter name, materials, or website.
- CAA will not list your chapter on any of its marketing materials, nor promote any chapter events.
- If your chapter is using a CAA-hosted website, it will be taken down.
- Your chapter will not be covered under CAA’s event liability insurance.
- If your chapter was provided with a CAA-made banner, it must be returned to CAA. The banner will be returned to your chapter if it re-establishes itself.
- Your chapter must relinquish all official chapter monies to CAA and close any accounts associated with CAA’s Tax ID. The monies will be held by CAA in your chapter’s name and given back if your chapter re-establishes itself or another chapter is started that serves the same constituents.

## Alumni Chapter Financial Operations

Alumni Chapters have several options for managing their finances and a number of resources provided by CAA to help them do so.

### Financial Organization

#### Allowed Usage of CAA's Nonprofit Tax ID

Your chapter may use CAA's Tax ID for the following purposes:

- To open a bank account for the alumni chapter to pay a discounted, nonprofit rate
- To provide to vendors to receive a discounted, nonprofit rate

#### Bank Accounts

Your alumni chapter has several options for managing your finances.

1. **No bank account**  
Your alumni chapter can choose not to collect membership dues or event monies and simply run no-cost events and programs.
2. **Bank account under the Alumni Chapter name using CAA's tax ID**  
Your alumni chapter can use CAA's nonprofit tax ID to open a bank account with lower fees. At least two active chapter board members must be listed as signatories on a bank account using CAA's tax ID. Prior to going to a prospective bank, obtain from the bank a list of the necessary documents required to open a bank account. Provide this list to your alumni chapter advisor to expedite the process. In addition, consider making an appointment in advance to ensure that a particular branch or location is able to open this type of account.
3. **Become a separate nonprofit organization**  
Alumni chapters have the option to become a separate nonprofit organization. We do not endorse this, due to the amount of work it takes to start and sustain a nonprofit organization long term. However, should a chapter choose to become an independent nonprofit, it will need to use its own tax ID to open a bank account. CAA's tax ID may not be used.

The following are PROHIBITED uses of Chapter bank accounts:

1. **Your chapter may not open a bank account under an individual's name using the individual's social security number**
2. **Your chapter may not open a bank account under your alumni chapter's name using an individual's social security number**
3. **Your chapters funds cannot be managed by CAA**  
We are unable to manage your chapter's finances. If your alumni chapter dissolves or is de-chartered, we will hold onto your funds until the alumni chapter revives. The monies will subsequently be reissued.

### Contributions and In-Kind Gifts

#### Contributions

CAA gratefully acknowledges your generosity and thanks you for your individual and alumni chapter contributions. The following are the details for making and accepting contributions:

- Contributions to your chapter can be accepted by your chapter and considered a contribution to your chapter. Unless your alumni chapter is an independent nonprofit, contributions are not tax-deductible.

- Contributions to your chapter can be accepted by CAA and returned to your chapter in 6-8 weeks, minus philanthropic and processing fees. These contributions are tax-deductible, and the university will provide receipts to donors.\*
- Your alumni chapter may solicit and collect donations on behalf of CAA or the university. These gifts are tax-deductible.
- Tax-deductible donation receipts are provided when contributions are made directly to CAA or the university.

*\*Alumni can make a tax-deductible gift to an alumni chapter by visiting the [Alumni Chapters Program Giving Page](#). In the comments section, alumni must note: "Please designate my gift to [Chapter Name]."*

If individuals want to receive a receipt, please mail a check payable to "Cal Alumni Association," or make an online gift.

1. To make a gift by mail, print the [giving form](#) and mail your gift to:

Development Department  
Cal Alumni Association  
1 Alumni House  
Berkeley, CA 94720-7520

2. To make a credit card gift by phone, please call 510.900.8200.
3. To make a gift online, visit <http://alumni.berkeley.edu/give/ways-give>.

CAA recognizes alumni chapters hold events or solicit contributions for their CAA scholarship endowment. In this scenario, individuals should make checks payable to "Cal Alumni Association" with a note indicating where to direct the gift (e.g. Rossmoor TAAP scholarship). Please collect checks and mail to:

Development Department  
Cal Alumni Association  
1 Alumni House  
Berkeley, CA 94720-7520

Any questions about contributions can be directed to Melina Armstead, Director, Donor Relations, at [melina.armstead@alumni.berkeley.edu](mailto:melina.armstead@alumni.berkeley.edu) or 510.900.8175.

#### **In-Kind Donations of Goods\***

Your alumni chapter may accept in-kind gifts of goods to your alumni chapter, but CAA cannot provide tax receipts. Individuals should consult their legal and tax advisors for professional advice regarding the tax and legal implications of in-kind gifts.

Your alumni chapter may collect in-kind gifts on behalf of CAA scholarships, CAA programs, and other campus departments. These are only tax-deductible to the extent allowed by the IRS [[See IRS Publication 526, Charitable Contributions](#)].

Individuals wishing to receive university credit for in-kind gifts should complete the [Deed of Gift form](#) and mail to:

Development Department  
Cal Alumni Association  
1 Alumni House  
Berkeley, CA 94720-7520

Please submit "Deed of Gift" forms to CAA within one month of incurring the expenses.

#### **In-Kind Donations of Services\***

In-kind donations of services are not tax-deductible [[See IRS Publication 526, Charitable Contributions](#)]. CAA cannot provide a tax-deductible receipt for any kind of donated service.

Examples of services include the following:

- A graphic designer donates her design services to make a t-shirt design.
- An alumni chapter member volunteers his time to staff an event.
- A chef donates his time to prepare hors d'oeuvres for a reception.

\* NOTE: If you are not certain if a donation is considered a service or a good, please contact your Alumni Chapter Advisor for clarification before accepting the contribution.

## PayPal Instructions

1. Go to [PayPal.com](https://www.paypal.com) and click the “Sign Up” button in the upper right corner.
2. Open a “Business” account. Click on the “Get Started” button in the “Business” box.
3. There are 3 Account Options. CAA recommends the free “Standard” account that will serve all chapter needs.
4. Click the “Get Started” button for the Account Option you select.
5. Select “Create New Account.” Do not login with your existing personal PayPal account. CAA does not recommend linking your personal PayPal to your alumni chapter’s PayPal account.
6. For “Business Type,” pick “Nonprofit Organization,” if your chapter’s bank account is in your alumni chapter’s name and you are using either CAA’s Tax ID (94-1007751) or your chapter’s nonprofit tax ID.
7. Enter an email address not currently linked to an existing PayPal account.
8. “Business Name” should be your alumni chapter name, with the remaining contact fields pertaining to your alumni chapter.
9. For “Category,” select “Other.”
10. Enter CAA’s Tax ID (94-1007751).
11. Fill out the remainder of the information and hit “Continue.”

Please contact your Alumni Chapter Advisor if you have any questions.

## Contracts

Occasionally, your alumni chapter may enter agreements and contracts with third party entities (e.g. t-shirt vendors, graphic designers, hotels, bars, restaurants, etc.). Below are CAA’s policies and expectations around such contracts and ways to help your alumni chapter prevent and protect itself against disagreements with third party entities. Please talk with your Alumni Chapter Advisor if you have any concerns or questions before you finalize an agreement or contract.

### Agreements

For the purposes of the Alumni Chapters program, CAA defines “agreements” as any monetary exchange for goods or services, or non-monetary exchange of services for services. These tend to be more informal and may not always include a signed, written agreement.

**Example 1:** Your alumni chapter makes an arrangement with a local bar to provide a donation to your alumni chapter equal to 10% of the final bar tab from your alumni chapter’s happy hour hosted there. The bar is making a donation or monetary payment to your alumni chapter in exchange for promotion and hosting of the event at the bar.

**Example 2:** A graphic designer donates her services to your alumni chapter in exchange for promoting herself to your chapter with the aim of netting additional paid business.

### CAA Expectations:

- Memorialize these agreements in an email or a written letter with a clear explanation of what is being provided to and received by your alumni chapter, and what is being provided to and received by the third party entity, including a clear timeline of delivery for both parties.
- Define an end date. If there is none, indicate that the agreement is open-ended.
- Send a copy of the email or written letter confirming the details of the agreement to your Alumni Chapter Advisor.

### Contracts

For the purposes of the Alumni Chapters program, CAA defines “contracts” as any formal written contract for the provision of services or goods by a third party entity in exchange for monetary payment from an alumni chapter.

**Example:** Your alumni chapter must sign a contract with a hotel in order to reserve event space and book catering for its Annual Dinner and Elections. The contract stipulates that your chapter must commit to a minimum catering expenditure at the time of signing the contract, but the final bill will not be paid until after the event and will be based on final food and beverage consumption.

### Expectations:

- Contracts valued under \$1,000: Your alumni chapter may sign the contract without prior approval. Inform your Alumni Chapter Advisor and provide him/her with a copy of the contract.
- Contracts valued at \$1,000 or more: We strongly recommend getting in touch with your Alumni Chapter Advisor prior to this signing. If possible, provide him/her with a copy of the contract before final contracts are signed.

## Scholarships to Students

Many alumni chapters want to give scholarships or gifts to Cal students. Raising money for and awarding scholarships is a complex endeavor that is subject to many tax and legal rules. CAA has outlined the best ways for alumni chapters to get involved with scholarships, which include the following:

1. **Volunteer with CAA’s Alumni Scholars Program**  
Visit [alumni.berkeley.edu/scholarship-selection](http://alumni.berkeley.edu/scholarship-selection) for information about volunteering to be a District Chair, reader, and/or interviewer.
2. **Raise money for CAA’s Alumni Scholarships**  
Alumni Chapters are encouraged to fundraise on behalf of CAA’s Alumni Scholarships. Your alumni chapter may choose to receive checks at an event or donate proceeds from an event to CAA. To learn more about how to make or submit contributions to CAA, refer to the “Contributions” section of the Alumni Chapters Manual.

Please contact your Alumni Chapter Advisor with any questions.

## Monetary Support: Alumni Chapters Grant Program

### Guidelines

The monetary support via CAA’s [Alumni Chapters Grant Program](#) is designed to help your chapter cover out-of-pocket expenses and is dispersed on a reimbursement basis. CAA will only reimburse expenses that were not recouped via the selling of event tickets or other event income, up to the approval amount. Adhere to the following guidelines regarding the grant program for monetary support:

- Grant applications must be submitted within the application period.
- Unused monetary support cannot be rolled over to the next year.
- Monetary support is not guaranteed even if an application has been submitted.
- CAA can reimburse for expenses such as venue rental, catering, decorations, travel and meal expenses for a speaker, and other expenses that may be associated with an event.
- CAA can only reimburse for gratuities up to 20% (unless there is a mandatory service charge by an establishment for large groups).
- CAA cannot reimburse for any costs associated with a non-CAA-hosted website (including its creation, design, and maintenance) or non-CAA email blasts.
- CAA cannot reimburse for any speaker honorarium.
- CAA cannot reimburse for any alcohol expenses.

### Qualifying for Support

In order to qualify for monetary support, your chapter must fulfill the following requirements:

1. Meet all of the expectations and responsibilities of maintaining a charter with CAA.
2. Submit a complete [grant application](#) on time (incomplete applications will not be eligible for consideration).
3. Be able to articulate how your event or use of monetary support clearly aligns with CAA's mission and strategic priorities.

### Expectations

*If the grant is used to support an event:*

1. Your chapter must actively communicate the event to your membership (e.g. email, social media, website, newsletter, etc.). We recommend your chapter utilize an [email blast](#) through CAA to promote the event to the alumni community that your chapter serves.
2. Your chapter must employ a registration system to collect alumni participant information, the minimum of which includes attendee names, email addresses, and class years. The event attendee list with this information must be submitted.
3. In order to receive the money promised in the approved grant, the event must happen. If the event is canceled, the grant will be rescinded.
4. Your chapter must complete an [Event Report](#), which includes a list of event attendees.
5. Take photos at the event and share them with CAA. CAA reserves the right to use the photos for marketing, including but not limited to, email, web, social media, and print collateral.

*If the grant is used to support something other than an event (e.g. production of a newsletter):*

1. The Alumni Chapters staff will determine the best way to measure the impact and engagement of your chapter's effort.
2. A general report that breaks down the perceived success and impact on the alumni community will be required.

### Disbursement of Grant Money

- The money is a direct reimbursement to your chapter. Your chapter will be notified of the amount for which you have been approved for reimbursement.
- Reimbursements will be made based on actual costs.
- Your chapter must submit itemized receipts (i.e. receipts must list the description of items purchased). They should be submitted all at once. Credit card receipts or statements are not sufficient. Copies, scans, or photos of receipts are acceptable.
- Any unused money will not be "floated" to another event or expenses unrelated to the approved grant.

- Reimbursements will not be issued until all expectations are fulfilled.
- We will cut one check per grant. The check is typically cut to the name of your chapter. If your chapter does not have a chapter bank account, the reimbursement check may be cut to one official board member of your chapter. To ensure that the payee is an official board member, please check with your Alumni Chapter Advisor and complete the [board member update tool](#).
- Confirm with your Alumni Chapter Advisor the correct payee name (either your chapter name or an official board member name) for the check and address where it should be mailed.

### **Decisions and Notification**

The Alumni Chapters team will deliberate each quarter. Their decisions are final. Notifications will be emailed to your chapter president and the contact person listed on your Grant Application.

## **Alumni Chapter Responsibilities**

Running a chartered Alumni Chapter with CAA is a big responsibility and requires the efforts of multiple board members working together to be truly successful. The following responsibilities constitute CAA's minimum expectations for an alumni chapter to maintain its charter. Charters are renewed annually each January as long as the alumni chapter has fulfilled its responsibilities for the previous year.

### **Alumni Chapter Reporting**

- Provide an up-to-date alumni chapter membership list by March 1 of each calendar year in an Excel-compatible format (.xls, .xlsx, .csv).
- If your chapter uses CAA's Tax ID for their bank account, you must provide a December bank statement and an "End-of-Year Balance Sheet" to your advisor by March 1. A template for balance sheet is provided by CAA.
- Submit Event Reports with attendance list to Alumni Chapters staff no later than two weeks after each event. The Event Report will be made available as an online and printable form.
- Provide timely updates to Alumni Chapters staff about any changes in board members' assignments.

### **Alumni Community Engagement**

- Hold at least one event per quarter for all alumni in chapter's area or interest. These four events (annually) should fulfill at least three of the different Services to Cal outlined in the Alumni Chapters Manual.
- Chapter must maintain an up-to-date website (mandatory) and social media presence (if applicable).
- Maintain regular communications with membership base: at minimum, one email per quarter associated with the event(s) the chapter is hosting. This email can be one of the email blasts that CAA offers to provide each chapter.
- Actively promote CAA membership at events, in emails, and through online communication channels (website and/or social media).
- At least 50 active alumni members of the chapter (who consistently attend meetings and events, volunteer, and/or correspond with the chapter regularly).
- Co-sponsor CAA and university events and programs in your area (when appropriate and within means).

## Alumni Chapter Resources

As a chartered alumni chapter with CAA, you have access to organizational, online, and event hosting resources. These resources are specifically designed to help your alumni chapter build an engaged community of alumni and fulfill the responsibilities associated with maintaining a charter with CAA.

### Organizational Resources

- Dedicated support from your Alumni Chapter Advisor for the running, managing, and development of your alumni chapter—by phone and email or in person. Your Alumni Chapter Advisor has extensive experience in event planning and execution, volunteer programming, and nonprofit board structure and organization.
- Directors and Officers (D&O) liability coverage provided for your chapter’s board members.
- Usage of CAA’s Tax ID to open a chapter bank account.
- Monthly Chapters Update email from the Alumni Chapters team with important program updates, event hosting and campus partnership opportunities, and resources to help you and your chapter.
- Access to private Facebook group for networking with fellow chapter leaders.
- Exclusive invitation to the annual “Alumni Volunteer Leadership Conference”—a 2-day intensive conference with workshops and resources to help you develop your alumni chapter.
- Access to financial support from CAA—grant application and approval process required.
- One custom banner for use throughout your chapter’s tenure.

### Online Resources

- The Berkeley Career Network, an online community for alumni and students to connect, seek professional expertise, and share career insights.
- Chapter events posted on CAA’s website and event calendar, which receive more than 60k unique visitors monthly.
- Select chapter events may be featured in CAA and campus email and social media communication channels that engage more than 170,000 alumni.
- Chapter landing page on CAA’s website with contact info, chapter description, and links to chapter website and social media.
- Website hosting and support from CAA, with an easy-to-use site interface and training provided by CAA staff.
- Emails blasts sent to alumni within your community up to four times per year (3-month rolling basis) to promote your chapter events and volunteer opportunities.
- [Digital tools and resources](#) that will assist your chapter in managing and maintaining its day-to-day functions.

## Event Hosting Resources

- Liability coverage for all chapter events, including the ability to list your event venue as an “additional insured.” Insurance registration required for each event.
- Access to Eventbrite’s nonprofit rate and customer support for online event registration.
- Event support materials, including CAA-branded name tags and decorations, to make your alumni feel welcome and add a bit of blue and gold.
- CAA staff attendance at key events as available.
- CAA staff assistance and guidance in identifying and securing speakers for chapter events.

## Event Liability & Directors and Officers (D&O) Insurance

### Event Liability Insurance

CampusConnexions is the company CAA contracts with for our event liability insurance. Your alumni chapter must individually enter your own alumni chapter events through the [CampusConnexions](#) website.

A member of your alumni chapter will need to register all of your events—including viewing parties—at least two weeks before they occur in order to be properly covered. Submit an [online application](#) for insurance for your event on the CampusConnexions website by clicking "FAS Apply Online". You may also fill out a [physical application](#).

If the event venue requests to be listed as an additional insured on our policy, please contact your Alumni Chapter Advisor. This feature is not available through the CampusConnexions website.

### Directors and Officers (D&O) Insurance

The Directors and Officers (D&O) coverage is part of our insurance policy with CampusConnexions Insurance. This policy automatically covers all registered board members of a CAA-chartered alumni chapter. Please be sure to provide your Alumni Chapter Advisor with an up-to-date list of all your board members. You may also use [the board member update tool](#).

You can view the details of D&O Insurance Policy [here](#).

# Services to Cal

This section provides information about how alumni chapters can serve UC Berkeley, current and prospective students, and alumni. We believe that by supporting our alma mater, we will make a difference in helping UC Berkeley maintain and grow its status as the number one public university in the world.

The Alumni Chapters Program supports and encourages 6 Services to Cal:

## Alumni Networking

The cornerstone of being a part of an alumni chapter is networking with other Cal alumni.

### Networking Events

Hold your own career or social networking event in your area. Happy hours are great ways to attract younger alumni. Casual kid-friendly picnics bring out Cal alumni with young children. Starting a book club can bring together Cal alumni of all ages.

### Local Professional Networking Events

Keep abreast of local professional networking events in your area and encourage your alumni chapter members to attend.

## Cal Pride/Spirit

### Participate in Campus/CAA Spirit Events

#### [Alumni and Family Weekend \(Homecoming\)](#)

Organize a chapter event around Homecoming, including CAA's Young Alumni Tailgate or visit Alumni House, your home on campus!

#### [Annual Berkeley Charter Gala](#)

Attend UC Berkeley and CAA's signature event celebrating the founding of the University of California. Members of the UC Berkeley community who are pushing the edges of what's possible are recognized with Achievement Awards.

### Be Involved in CAA's Athletics Events

#### [Away Football Game Tailgates](#)

CAA hosts pre-game tailgates for select away football games. We rely on alumni chapters in the area to volunteer during the party, plan the tailgate, and/or organize an informal Friday night gathering.

#### [Home Men's Basketball Hoops Parties](#)

Host a table or more at one of CAA's Hoops Parties, held in Alumni House before a select number of men's home basketball games.

#### [Bowl Game Activities](#)

Participate in CAA's bowl game activities as a chapter and/or volunteer to help.

### Be Involved in CAA's Athletics Events

#### [Viewing Parties](#)

When Cal games are aired on TV, set up a viewing party at a bar or restaurant to provide local Cal alumni a welcoming place to view the game and cheer Cal to victory.

### [CAA Membership](#)

Encourage your chapter members to become dues-paying members of CAA. We will all thrive if we support one another.

## Lifelong Learning

Over the years, we have heard from alumni—from all eras and from all over the country—who want to learn new skills, challenge their intellects, and miss the educational aspects of their lives as students. You may satisfy one of your Services to Cal by providing programs that impart practical knowledge or stimulate the minds of your chapter members.

**Ways your alumni chapter can fulfill this Service:**

- Plan campus speaker events (see Campus Speakers for more information).
- Organize outings to local museums, intellectual lectures, or cultural events.
- Participate in practical seminars: financial planning, buying a house, or career services.
- Host a reception for your members before or after a faculty seminar during Homecoming or a Discover Cal lecture series.
- As an alumni chapter, attend a Discover Cal lecture.
- Participate in community-building activities such as beach cleanups, reading to kids, or volunteering for a soup kitchen.

## Philanthropy

Now, more than ever, UC Berkeley and CAA need your support. Inspire your alumni chapter to donate toward a Cal cause through one of the opportunities listed here.

### [CAA Fund](#)

As the cornerstone of the Cal Alumni Association, The CAA Fund supports programs and services that impact you and the university. CAA is a 501(c) (3) nonprofit and self-funded organization that relies on contributions to operate its programs. Your annual investment in The CAA Fund ensures that we actively and effectively involve, inform, and inspire all alumni to stay connected to the university and one another. Together, Cal is our cause.

### [CAA Scholarship Endowments](#)

Endowments are essential to maintain a sustainable scholarship program.

Your alumni chapter can donate to an existing CAA endowment for any of our three scholarship programs or establish a new endowment with a gift of \$100,000 or more. If your chapter is interested in starting or contributing to an endowment, visit our website or contact your Alumni Chapter Advisor who will connect you to our Development team.

**The Leadership Award** Your gift to The Leadership Award directly supports the leaders of tomorrow by giving them access to UC Berkeley. Each year, approximately 650 incoming and continuing scholars receive one-year scholarships of \$2,000.

**The Achievement Award Program (TAAP)** Your contribution to The Achievement Award directly supports students with high financial need who serve their community. Each year, approximately 25 incoming freshman and junior transfers are welcomed and receive up to \$6,000 per year (for 4 years or 2 years, respectively) and a laptop.

**The Kruttschnitt Aspire Scholarship Program (KASP)** Your support of the Kruttschnitt Aspire Scholarship Program helps to increase diversity on the UC Berkeley campus. The program supports low-income, underrepresented

minority students who have been admitted to Cal as an incoming freshman or junior college transfer. Each year, CAA awards 25 incoming freshman and junior transfers with \$6,000 per year (for 4 years or 2 years, respectively) and a laptop.

### **Campus Non-Scholarships Fundraising**

Your alumni chapter may choose to fundraise monies for campus non-scholarships beneficiaries such as academic units, libraries, student groups, etc.

## **Scholarships**

Volunteers are a vital part of [CAA's Alumni Scholars program](#).

Since 1934, **The Leadership Award** has recognized and supported Cal student leaders with merit-based scholarships. With more than 15,000 scholars since its inception, The Leadership Award is the largest merit-based scholarship of its kind in the UC system. The scholarship is awarded to Cal students who are able to inspire others to mobilize for a cause, apply innovative methods to solving challenges, and can make a visible impact on the campus.

Since 1999, **The Achievement Award Program (TAAP)** has provided high achieving, low-income students with the resources needed to attend and excel at UC Berkeley. This CAA scholarship serves freshmen and transfer students who might not otherwise have the resources to attend college. Most TAAP scholars are first generation college students.

**The Kruttschnitt Aspire Scholarship Program (KASP)**, previously known as the Equity Scholarship, is named in recognition of a legacy commitment made by Cal alumnus, local business and community leader, Theodore (Ted) H. Kruttschnitt '64. The program supports low-income, underrepresented minority students who have been admitted to Cal as incoming freshmen or junior transfers. In addition to financial aid, KASP scholars receive wrap-around services to ensure their success at Cal.

### **How can your alumni chapter participate?**

- Serve as a CAA Scholarship District Chair by recruiting alumni volunteers and arranging local interviews for incoming freshmen. (This commitment is an estimated total of 50 hours over 6 months.)
- Read, evaluate, and score scholarship applications under the direction of the CAA Scholarships Department (March/April/July).
- Interview scholarship applicants with training from the CAA Scholarship Department (May/April/Sept).
- Participate in panels, social networking events, and workshops hosted by the [Cal Alumni Student Association \(CASA\)](#).
- If your alumni chapter would like to invite local CAA Scholarship recipients to your events, please contact your Alumni Chapter Advisor at least one month before the event date.

Please Note If your chapter is interested in running your own scholarship program or gifting money to students outside of the CAA Scholarship program, please note we have a defined process in place that must be followed ([more information here](#)). Contact your Alumni Chapter Advisor for more information.

## **Student Involvement**

### **Summer Welcome Parties**

Your alumni chapter can host and plan an afternoon of networking and activities for the new incoming Cal students and their families before they attend Berkeley in the fall.

### **Student and Alumni Engagement**

Sponsored by the Cal Alumni Association, the Cal Alumni Student Association (CASA) A creates a vital link between Cal students and alumni through their programming and events. In order to showcase a model to current students of dedicated alumni-hood and “giving back,” alumni involved in your alumni chapter are encouraged to attend events such as:

- Top Dog Career Networking Luncheon in February
- Panel discussions with students at Alumni House
- Young Alumni and Graduating Senior events in May
- Legacy Night Dinner during Alumni and Family Weekend in October
- Coffee Chats throughout the year

# Event Planning and Publicity Tools

This section of the manual will provide you with a detailed overview of the tools and resources that CAA provides, as well as some best practices on how to run and manage events. You can also refer to the Marketing Best Practices document for more tips.

As always, feel free to reach out to your Alumni Chapter Advisor with any questions or needs you might have to ensure the success of your chapter's events.

## [Marketing Best Practices for Alumni Chapters](#)

### Event Planning Tips

Successful events are well planned and coordinated. Preparation is key. When planning an event, you and your volunteers are responsible for the education, entertainment, nourishment, safety, and care of all attendees. Here are some tips to consider:

#### 1. EVENT PLAN

- Create an event plan with your volunteer leaders and event staff.
- What is the goal of the event?
- What does success look like?
- Who is the target audience?
- What do they get out of it?
- What is your budget?
- How many volunteer hours do you need?
- What program elements do you want, such as food, speaker, etc.?

#### 2. TYPE OF EVENT

Choose events that your volunteers are passionate about hosting, as successful events require time from you and your fellow leaders. Diversify your calendar of events to attract different constituencies.

#### 3. DATE SELECTION

Check campus and other Cal calendars—[Cal Athletics](#), [major campus events](#), [CAA events](#), etc.—before choosing a date to ensure there are no conflicts with your potential event date. Local entertainment calendars are good to check as well.

#### 4. EVENT DETAILS

At least 3 to 4 months prior to your event, you should secure the following:

- Venue
- Keynote speaker(s)
- Catering services
- Entertainment

Make sure you understand the terms of the venue and catering and entertainment contracts and when deposits and guarantees are due. With keynote speakers, confirm travel arrangements, topic, bio, and other details. Once the major pieces are locked down, begin planning details such as decorations, check-in process, name tags, at-the-door ticket sales (cash box and starter change if needed), printed material needs, etc.

#### 5. EVENT PROMOTION

Consider how you will promote your event. Roll out your promotion.

- Step 1: Send an advance “Save the Date”
- Step 2: Share RSVP/Ticket Purchase information
- Step 3: Send a final “Reminder” as you get closer to the event

All events should have a website for more information and a way to register online.

#### 6. COMMUNICATION

Have Clear, Concise, and Consistent communications with your audience. Make sure all of your communication channels (email, print, website, social media, etc.) have the same clear information regarding the event.

#### 7. WALK THROUGH

Put yourself in the shoes of an attendee and “walk through” your event, starting with the communications you receive to arriving on-site and enjoying the event. Do you understand what the event is? Is it obvious how to register and where to park? Can a person hear in the back of the room? Ask yourself the questions you might have if you were an attendee.

#### 8. POST-EVENT

Send a post-event survey to your attendees to assess your event. Ask the question: “Would you recommend this event to your friends?” You can use free services such as [SurveyMonkey](#), [Typeform](#), or [SurveyGizmo](#), or follow up via [Eventbrite](#) if you used it as your registration tool.

## Event Publicity through CAA

CAA can post your events on our website to promote your chapter events to the general alumni population so you can attract new alumni to your event and to your chapter.

### Online Event Postings

[alumni.berkeley.edu/events](http://alumni.berkeley.edu/events)

We need the following information to post your event online (more info can be added any time):

- Chapter name
- Chapter website (can also be social media page)
- Name of event
- Date of event
- Start and end time of event
- Name of venue/location
- Address of venue/location
- Venue/location website
- Contact person name
- Contact person email
- Contact person phone number
- Description of event
- Event registration link (can be website or Eventbrite event)
- Cost (include tiered pricing if applicable)
- Registration deadline and walk-up information
- Program including speaker information, if there is one

### **This information would add value to your event:**

- Menu
- Is the event kid-friendly?
- Disability accommodations
- Parking information
- Dress code
- Directions
- Entertainment

## **Campus Speakers**

Your chapter may want to host events that include a presentation from a speaker from campus. While these events are rewarding and interesting for UC Berkeley alumni, obtaining a campus speaker can be challenging. Below are steps and tips to be successful in recruiting campus speakers. Please remember that faculty and campus administrators are busy, so be realistic.

### **Step One**

Begin your recruitment at least five months in advance of your event. Being flexible with your dates may increase your success in finding a speaker.

### **Step Two**

Identify a list of topics you think would be interesting to your chapter members. Contact your desired speakers with a “preliminary inquiry” (not a formal invitation) so you can contact several speakers at one time to assess their availability and interest.

### **Step Three**

Once you have a speaker who is interested and available, send the speaker an invitation. Provide information about the speaking opportunity (date, time, location, speaking time, expectations). Clarify travel arrangements and inform your speaker about any expense reimbursement from your chapter. Note that if your event is supported by a CAA grant, speaker honorariums (i.e. speaking fee or monetary gift) are not reimbursable by the Grant Program.

### **Tips for Finding a Speaker**

- Find a date/time that works for campus speakers. The start of a new semester or the height of midterms or finals are not great times for faculty members. Don't request coaches if their sport is in season.
- Consider asking emeriti faculty who have a lifetime of experience but are often less busy than faculty who are actively teaching or researching.
- If a faculty member is not available, but your chapter is interested in a specific topic, ask the faculty member to recommend a graduate student who is knowledgeable about the topic and a good speaker.
- Consider campus administrators—not just the Chancellor. The provost, vice chancellors, and director of admissions are just a few examples of interesting speakers who know quite a bit about what's happening on campus.
- Tag onto a faculty member/campus administrator's existing trip to your city, or create a chapter event around a [Cal lecture](https://discovercal.berkeley.edu/) in your area.
- Look for speaker ideas by looking through issues of California Magazine. Check out campus websites for lists of faculty award winners, interesting faculty research, and past faculty lectures.
  - [berkeley.edu/news/extras](https://berkeley.edu/news/extras)

- [homecoming.berkeley.edu](http://homecoming.berkeley.edu)

## FAQs

- **Who makes the “ask?”** Your chapter should make the “ask,” especially if there’s a personal connection. Your position as an alumni volunteer leader can be just as influential, if not more so, than any CAA staff member. Your Alumni Chapter Advisor can also assist you.
- **Who pays for speaker expenses?** Your chapter will be most likely be responsible for the speaker’s costs unless the speaker offers to cover his/her own travel expenses. We recommend that your chapter create an event budget and charge a ticket price that will help the chapter at least break even after factoring in all the costs of your event.

## Student Spirit and Musical Groups

Chapters often wish to have the Rally Committee, Yell Leaders, the Cal Band, the UC Men’s Octet, the Women’s California Golden Overtones, the Dance Team and/or Oski appear and perform at their events. There are other less well-known student performance groups worth exploring (e.g. UC Ballroom Dancers, UC Jazz Choir, Indus Dance Team, etc.). Your Alumni Chapter Advisor can help you contact the leaders of these groups and their staff advisors.

### Follow these Steps

Determine which group you would like to perform at your event, then contact your Alumni Chapter Advisor at least two months prior to your event with this information:

- Date of the event
- Time of the event
- Location of the event
- Group(s) you want to appear

Your Alumni Chapter Advisor will contact the group(s) you have requested and inform you of the costs and the group’s availability. Your Alumni Chapter will be responsible for paying the student performers directly.

Sample fees are included below. The Cal Band typically asks for \$500–\$1000 depending on the event. Oski can be up to \$500. Prices are subject to change, so check with your Alumni Chapter Advisor when budgeting.

### UC Men’s Octet and Women’s Golden Overtones Performance Fee Structure

	On-Campus	Off-Campus outside Berkeley City limits	Off-Campus outside Berkeley City limits*
1 to 3 Songs	\$100	\$150	\$350
4+ songs up to 20 minutes	\$150-\$200	\$200-\$250	\$500
20 to 30 minutes	\$250	\$300	\$600

\* Within 30-mile radius. If over a 30-mile radius, fee arranged on a case-by-case basis.

### Other UC Berkeley Singing/Performing Groups

Your Alumni Chapter Advisor can also help you contact other singing or performing groups on campus. Many of the groups tour nationally and have garnered awards for the performances. The rates are different than those quoted above and depend on the individual group.

## Usage of Cal and CAA Logos

If your chapter wishes to produce merchandise with a Cal logo (e.g. script Cal, bear paw, walking bear, Oski, etc.) or the CAA logo, either for sale or for giveaway, the production and design must be approved by both CAA and [UC Berkeley's Office of Business Contracts and Brand Protection \(BCBP\)](#), and the merchandise must be produced by a Cal-licensed vendor. Merchandise for resale is subject to royalties.

UC Berkeley and CAA logos may not be used without prior approval from the university and/or CAA, respectively.

For more information and guidelines regarding the university's policies, visit [bcbp.berkeley.edu](http://bcbp.berkeley.edu).

For CAA identity guidelines, visit [alumni.berkeley.edu/brand](http://alumni.berkeley.edu/brand).

## Alumni and Student Data

We can help your chapter contact alumni (from the Cal Advancement Database System – CADS) and students (from the Office of Undergraduate Admissions) to promote your chapter's activities and select student programming. Below are general guidelines for data requests and usage:

### Alumni Data

- CAA provides alumni data to your chapter to help you recruit new members and to encourage them to sign up on your email list for more regular communications from your chapter.
- CAA can only provide your chapter with ONE of the following forms of data per request: Mailing Address or Email Address.
- Your chapter may request alumni data from your geographical area or special interest up to four times per year, approximately once per quarter.
- It takes approximately four months to produce an alumni data list, so please plan accordingly. Content (i.e. email blast text) needs to be provided to your Alumni Chapter Advisor no later than two weeks after submitting a data request.
- All email blasts will be sent by the Alumni Chapters staff and all mailings need to be sent through a local mailing house. Per university rules, data cannot be provided directly to alumni chapters.
- New graduates are imported into CADS by the end of August of each year.
- The Data Pull and Email Blast Request form can be found [here](#).

### Student Data

- When participating in Student Programming, your chapter can work with the Students and Young Alumni department team to promote their approved events to students.
- We are unable to provide physical or electronic lists of student data to your chapter. All communications must be through CAA or approved mailing houses. NO exceptions.
- Summer Welcome Parties have approval from Admissions for the provision of "phone banking" lists so your chapter can call students in your area to invite them. Specific guidelines and expectations will be provided to your chapter (if you are participating).
- If your chapter would like to invite local CAA Scholarship recipients to your events, please contact your Alumni Chapter Advisor at least one month before the event date.

## CAA-Hosted Websites

CAA provides all alumni chapters with a hosted website. All chartered alumni chapters are required to have a website with up-to-date information and calls to action for their volunteers and members. Your chapter may choose to use the one provided by CAA or one you have created and keep updated on your own.

### Benefits of a CAA-Hosted Website

- Works seamlessly with the CAA website and creates consistent branding with CAA for your chapter.
- Easy to use (no HTML knowledge needed).
- Looks great and is easy to navigate.
- Customizable to your chapter's needs.
  - Automatically links to your chapter's events on the CAA calendar.
  - Link all social media pages directly on your home page
  - Create an event or information highlight on your home page
  - Encourage visitors to add themselves to your contact email list
  - List upcoming events
  - Upload documents

### Getting Started on your CAA-Hosted Website

- Choose someone in your chapter to manage your website. He/she should be comfortable with computers and have an eye for detail, but no coding or HTML experience is needed.
- Contact your Alumni Chapter Advisor to gain administrative access.
- For step-by-step instructions, refer to [the how-to document](#).

### CAA's Expectations of all Alumni Chapter Websites

- The website must contain up-to-date and accurate information.
- The website cannot link to any leader's personal business.
- Any non-CAA hosted website must include the "Chartered Alumni Chapter" logo provided by CAA on the website. Link this logo back to the CAA website ([alumni.berkeley.edu](http://alumni.berkeley.edu)).

### Questions?

Contact your Alumni Chapter Advisor for more information or with any questions you have.

*Please note: CAA is unable to provide website support for alumni chapters not using a CAA-hosted website.*

## Social Media

Here are suggestions to get your chapter started on social media:

### [Facebook](#)

Setting up a Facebook Group or Page for your Alumni Chapter is a great way to create a social media presence, attract new members, and provide an online community for your members.

- Group or Page? There are a number of great "Help" articles in the [Facebook Help Area](#).
- A Facebook Page is public and accessible to anyone.  
A Facebook Group is closed and private to its members and monitored by an administrator. Approval by the administrator is required for someone to join the group and content can also be monitored.
- "Like" the [Cal Alumni Association Page](#) on Facebook.

### [@cal](#)

@cal is UC Berkeley's online alumni community. This community is similar to Facebook and is only open to Cal alumni. As an alum, you can also create a berkeley.edu email address through this portal.

### [LinkedIn](#)

Creating a LinkedIn Group for your alumni chapter will provide a space for your members to connect with Cal alumni in your region (or ethnicity or area of interest) in regards to their career development.

- Join the [Cal Alumni Association's LinkedIn group](#).

# Glossary

## **@cal**

The online community of Cal alumni and members of CAA. Join the community and update your information at [cal.berkeley.edu](http://cal.berkeley.edu).

## **Active Members**

Individuals who consistently attend meetings, events, and functions as well as volunteer and correspond with your alumni chapter regularly.

## **Alumni Chapter Leaders Email List**

Every alumni chapter president is required to be on this email list to receive updates from CAA. Additional chapter leaders may also join the email list by contacting your Alumni Chapter Advisor.

## **Alumni Volunteer Leadership Conference**

The annual meeting of alumni chapter leaders held in Berkeley.

## **Alumni House Rental**

CAA rents out the Alumni House for events, parties, social gatherings, conferences, and community functions. As a chartered alumni chapter, you have access to one free use of Alumni House as a venue each year. Outside of the one free use, CAA will cover some costs of the set up and clean up done by CAA event staff—please contact your Alumni Chapter Advisor for additional details. Your alumni chapter will be responsible for any other fees such as linens, catering, decorations, etc.

## **The Berkeley Career Network**

Managed by CAA and the UC Berkeley Career Center, The Berkeley Career Network is a professional online platform that connects Cal alumni with students based on shared industry, major, and professional interest. Users can seek advice by sending messages and requesting online or in-person meetings based on their professional needs.

## **Banner**

One custom banner will be provided for use throughout your chapter's tenure in the Alumni Chapters program after three years of successfully meeting charter responsibilities. Should the banner be lost or destroyed, CAA can facilitate making a new banner, but the chapter will pay these costs.

## **Board of Directors, Cal Alumni Association**

([alumni.berkeley.edu/board](http://alumni.berkeley.edu/board)) The governing body of the membership of the Cal Alumni Association. Each board member serves a three-year term and is selected to engage in the Policy Governance work of the Association.

### **Bulk Mailing**

The United States Postal Service (USPS) is able to send mail at a less expensive and slower rate to qualified nonprofit organizations such as CAA. Chartered alumni chapters have the ability to use CAA's permit for their mailings. See the "Bulk Mailing" section.

### **CADS—Cal Advancement Data System**

CADS is the official university database for the UC Berkeley campus containing records for people and organizations associated with UC Berkeley including alumni, donors, prospective donors, faculty, parents, corporations, foundations, and members of the Cal Alumni Association. Your Alumni Chapter Advisor will use it to fulfill your data requests.

### **CADS ID**

Every person and organization in the CADS database has a unique CADS ID number. Associating the correct CADS ID with each of your members in your own database will facilitate updates to CADS, resulting in more accurate data pulls.

### **Co-Sponsorship of Events**

Your alumni chapter may wish to co-sponsor certain Cal events in your area. When partnering with CAA or the campus, your alumni chapter will be listed as a co-sponsor and be involved in the event planning process.

### **Data Management Protocol Agreement (DMPA)**

CAA is bound by campus policy and state and federal laws regarding data use and privacy. Given the sensitive nature of data, your alumni chapter is required to sign and adhere to an agreement defining the management and protection of CAA-provided data. CAA is committed to ensuring that the data we provide is used appropriately.

### **Dissolution / De-Charter**

Your alumni chapter can decide at any time to dissolve and terminate your relationship with CAA. CAA reserves the right to de-charter your alumni chapter at their discretion. If your chapter does not meet the responsibilities stated in this Alumni Chapters Manual, it will be de-chartered.

### **Event Liability Coverage**

CAA provides event liability insurance coverage through CampusConnexions. Your chapter must individually enter your own alumni chapter events through the CampusConnexions website.

### **Alumni Chapter Leaders Site**

CAA hosts a site where you and other alumni chapter leaders can access internal documents and stay up-to-date about deadlines and resources available for chartered alumni chapters.

### **FERPA**

The Family Educational Rights and Privacy Act (FERPA) is a Federal Law enacted in 1974 that protects the privacy of student education records and contact information.

### **Key Events (Alumni Chapter Advisor Attendance)**

Your alumni chapters can request an Alumni Chapter Advisor or other CAA Staff to attend key events that reach a wide range of constituents. Staff will need at least three months lead time to prepare arrangements for the trip. If you request the attendance of a CAA Board or senior staff member, please work with your Alumni Chapter Advisor to prepare a briefing document in advance.

### **Membership Roster**

Your alumni chapter will submit a complete listing of all of your members (both active and passive) so CAA can code your members in the CADS database and update the university's information. Please include CADS IDs if you have them. To be considered a "member" of your chapter, the person must have opted into your mailing list, signed up for your Facebook group or page, attended an alumni chapter event, or have expressed interest in some manner of your chapter. These lists are due to your Alumni Chapter Advisor in March of each year.

### **[Online Alumni Communities \(OAC\)](#)**

Alumni wishing to connect with fellow alumni in their regional area or area of special interest, but who do not wish to become a CAA-chartered alumni chapter, can form an Online Alumni Community (OAC). These communities do not receive benefits as outlined in this manual. If interested, contact CAA's Alumni Chapters Staff at [chapters@alumni.berkeley.edu](mailto:chapters@alumni.berkeley.edu) for more information.

### **Preliminary Inquiry**

In regards to requesting a speaker for your event, a preliminary inquiry should be sent before a formal ask. You can send several preliminary inquiries at one time. Information included should be: several date options, proposed location (city name), approximate number of participants, profile of the audience, structure of event (lunch, dinner, reception, etc.), length of speech, and reimbursement options. The correspondence is meant to gauge their interest.

### **University Policy on Non-Discrimination**

The Cal Alumni Association in accordance with the University of California, and in accordance with applicable federal and state law and university policy, prohibits discrimination, including harassment, on the basis of race, color, national origin, religion, sex, disability, age, medical condition (cancer related), ancestry, marital status, citizenship, sexual orientation or status as a Vietnam-era veteran or special disabled veteran. This non-discrimination policy covers admission, access and treatment in university programs and activities including but limited to the Cal Alumni Association reserving the right to not recognize chapters who apply for Alumni Chapter status who violate the terms set forth above.