

**UAB** NATIONAL  
ALUMNI SOCIETY

Knowledge that will change your world

# Chapter Operations Manual



## UAB Alumni Affairs Office

The Alumni Affairs Office serves as the link between alumni and the University. Our office receives hundreds of calls every month from alumni who have questions ranging from “When is the next home basketball game?” to “How do I find my old college roommate?”

Our office staff also serves as the support for the National Alumni Society Board of Directors. We are here to help them better serve you. If you ever need our assistance, we are here for you. Your chapter can consider our office your link to UAB, no matter where you are.

Get the information that you need in any of the following ways:

### Geographic Chapter Development

Paige Price  
(205) 934-3555  
cpprice@uab.edu

### Constituent Chapter Development

Paige Price  
(205) 934-3555  
cpprice@uab.edu

### Main Office Phone Lines

(205) 934-3555  
(800) 898-ALUM (2586)

### Mailing Address

UAB Alumni Affairs Office  
ALUM Building  
1301 10<sup>th</sup> Avenue South  
Birmingham, Alabama 35294-4555

### Website

[www.uab.edu/alumni](http://www.uab.edu/alumni)

## Alumni Affairs Staff

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## 2015-2016 National Alumni Society Board of Directors

### Officers

**Dr. Printella Ridgeway Thomas**  
President

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Immediate Past President

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President-Elect

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Vice President  
Alumni Relations

**Ms. Blanche Lowery**  
Vice President  
Student Relations

**Mr. Hafiz Chandiwala**  
Vice President  
Communications

**Mr. Steve Foster**  
Vice President  
Membership

**Mr. Mike Rowe**  
Treasurer

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Mr. Glenn Kinstler  
Ms. Leigh Lorino  
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Dr. Jacqueline Perry  
Dr. Mazi Rasulnia

Mr. John Reed  
Mr. Ryan Robinett  
Dr. Shipa Register  
Dr. Brian Sims  
Ms. Tammi Thomas

### Ex-Officio Directors

Dr. Ray L. Watts – UAB President  
Mr. Tom Brannan – Interim Vice President  
Dr. Jennifer R. Breland – Executive Director

## Important Campus Phone Numbers

Alumni Affairs	(205) 934-3555
Athletic Ticket Office	(205) 975-8221
Campus Recreation Center	(205) 996-5374
UAB Ticket Office	(205) 934-8001
Lister Hill Library	(205) 934-3306
Mervyn H. Sterne Library	(205) 934-6364
Snoozy's College Bookstore	(205) 328-2665
UAB Bookstore	(205) 934-4686
UAB Operator	(205) 934-4011
UAB Sports Information	(205) 934-0722

## Existing Alumni Chapters

(as of February 2016)

### Affiliate Organizations

Alumni Association of Graduate Programs in Health Administration  
University of Alabama School of Dentistry Alumni Association  
University of Alabama at Birmingham School of Optometry Alumni Association  
University of Alabama Medical Alumni Association

### Constituent Chapters

Accounting  
Ambassadors  
Arts & Sciences  
Athletic Alumni  
Black Alumni  
Business  
Education  
Engineering  
Health Care Management  
Honors Program  
MBA  
MPA  
MSHI  
Multicultural Scholars Program  
NMT

Nurse Anesthesia  
Nursing  
Occupational Therapy  
Physical Therapy  
Physician Assistants  
Psychology  
Public Health  
Public Relations  
Safety Blazers  
Social Work  
Student Alumni Society  
Theatre  
UAB Employee  
Young Alumni

### Geographic Chapters

Anniston-Gadsden  
Atlanta, GA  
Auburn-Opelika  
Central Alabama (Sylacauga, Alex City, Childersburg area)  
Charlotte, NC  
Cullman  
Dallas/Ft. Worth, TX  
Dothan  
Greenville, SC  
Gulf Coast (Pensacola)  
Houston, TX  
Huntsville  
Jacksonville, FL  
Memphis, TN

Mobile  
Montgomery  
Nashville, TN  
New York, NY  
North Mississippi  
Oneonta  
San Francisco, CA  
South Florida  
St. Clair County  
St. Louis, MO  
Tuscaloosa  
Walker County  
Washington, D.C.

### International Chapters

Taiwan  
Kingdom of Saudi Arabia (KSA)

## Types of UAB Alumni Chapters

There are three types of alumni chapters that exist under the NAS bylaws.

### Geographic



- A chapter of the UAB National Alumni Society may be located anywhere provided that at least 150 UAB graduates live within a 50 mile radius of the city, town or county where it is to be established.
- It is the Society's policy that the geographic chapter's name reflects its actual location, i.e., Greater Atlanta UAB Alumni Chapter, Gadsden/Anniston Alumni Chapter, etc.

### Constituent

- Graduates of a particular school or program may wish to form a chapter based on common academic or vocational interests. Plans for the organization and operation of chapters must be approved in advance by the Board of Directors of the UAB National Alumni Society.
- Any constituent chapter organized along academic lines should also require the approval of the affected dean.



### International Chapters

- The Board of Director's reserves the right to recognize groups of alumni in foreign countries who wish to affiliate with the National Alumni Society. The Board also reserves the right to waive any or all of the qualifying requirements for such groups as it deems appropriate.

### Affiliate Organizations

- Affiliate Organizations are the Alumni Associations for graduate and professional programs that were established prior to the development of the UAB National Alumni Society. Members of these organizations receive full benefits of belonging to both the designated alumni group as well as the National Alumni Society.

*Foreign affiliate chapters and constituent associations may be established by the Board of Directors upon receipt of an appropriate application from such groups. In addition, the recommendation of the appropriate academic vice president, subject to the approval of the president of the University, is required.*

## Roles and Purpose of a UAB Alumni Chapter

- Extend the University of Alabama at Birmingham physically, intellectually, and socially beyond the boundaries of the campus and the City of Birmingham.
- Renew and Encourage UAB friendships and camaraderie.
- Promote membership in the UAB National Alumni Society. Memberships sustain chapter activities and are a critical link between members and the university.
- Promote activities that are beneficial to UAB such as student recruitment, scholarship fundraising, and career networking and student send-off parties.
- Provide on-going presence of UAB within the community by assisting with local community projects.
- Serve as the channel of communication between individuals and the university by informing local chapter members of progress and challenges at UAB.
- Bring UAB to your community by featuring outstanding faculty, administration, professional staff and student talent as speakers at local chapter events.
- Assist with address updates by informing the Alumni Affairs Office of members who have relocated and/or changed careers.

**Most IMPORTANTLY -**

**An Opportunity for Networking with Other Alumni  
and Remaining Connected with YOUR Alma Mater!**



## How To Start A New UAB Alumni Chapter

Any group that wishes to be recognized as an official UAB Alumni Chapter must first complete the chapter petition (included in the forms section of the manual) by obtaining a minimum of 10 signatures of UAB alumni and friends that are currently active in the UAB National Alumni Society and are willing to support the local chapter. By calling the Alumni Affairs Office, we can provide you with a list of alumni in your area that you can contact to begin obtaining these signatures. This will provide you with common ground to approach these individuals and make the “ask” for their support.

Upon obtaining the required signatures, the petition, along with a letter from the chapter should be submitted to the current president of the UAB National Alumni Society for presentation to and approval by the NAS Board of Directors by the Vice President of Membership and Chapter Development. A sample of the letter requesting chapter status is included in the forms section of this manual.

Consideration by the Board of Directors will include such factors as:

- The number of potential members in the geographic area or discipline under consideration.
- Potential conflict with other Alumni Chapters in the local area.
- Level of enthusiasm and commitment of those making application and the likelihood of sustaining that commitment and enthusiasm over a period of time.

With approval of the NAS Board of Directors, a chapter leadership committee should be formed consisting of 5-7 alumni. An organization meeting will be scheduled where goals, plans, and future events and activities should be discussed.

## Tips on Being a Successful UAB Alumni Chapter

1. Conduct regular meetings of the leadership committee, at least quarterly.
2. Create an activities schedule, planned and announced to the membership early in the year.
3. Promote and publicize your activities.
4. Develop interesting and varied program to touch as many interest groups as possible.
5. Keep an up-to-date alumni listing. Advise the Office of Alumni Affairs of changes regularly.
6. Develop a broad base of leadership and involve as many alumni as possible.
7. Assist UAB in student recruitment in your area.
8. Consider funding a chapter scholarship for a student attending UAB from your local area.
9. Evaluate each event immediately. Identify reasons for success or lack of success.
10. Report club activities to the Office of Alumni Affairs.
11. Utilize the unique and special talents and abilities of the alumni and friends in your chapter.
12. Share your successes with other chapters.
13. Be Creative. Chapters that develop the most innovative program are the most successful!
14. Respond to the special needs of your demographic area.
15. Conduct at least two annual events.
16. Don't judge the success of your program purely on the number of alumni and friends attending one event. It's the whole program that counts.
17. Recognize and reward those who do a good job.
18. Keep your chapter financially sound through increasing membership and chapter gifts.
19. Make sure a chapter leadership committee member greets everyone who attends an event personally. Make them want to continue to participate!

## UAB Alumni Chapter's Policies and Procedures

After a UAB Alumni Chapter has become chartered, basic responsibilities must be fulfilled. Chapter Membership goals, chapter activities, and reporting are all part of those responsibilities. The expectations of each of these areas are outlined below. Copies of these manual and required reports are also available online at [www.uab.edu/alumni](http://www.uab.edu/alumni)

### **Chapter Name:**

According to the UAB National Alumni Society Bylaws, each chapter must use the name of its geographical or constituency based area in the naming of the chapter. That is, each UAB Alumni Chapter shall be known as the UAB (name of city, county, area, school, or program to be inserted) Alumni Chapter.

### **Membership:**

**UAB Alumni Chapters are for all UAB alumni and friends.** The UAB National Alumni Society is dependent upon dues-paying members to provide the necessary financial support to help carry on the services and programs needed for an effective UAB Alumni Chapter Program. Therefore, it is required that members of an Alumni Chapter must first be a member of the UAB NAS. For membership types, refer to the included NAS Bylaws. It should be noted that chapters may have additional qualifications for membership so long as they do not conflict.

At any time, an alumni chapter should have a minimum of 15 active members to continue as a formally recognized chapter of the National Alumni Society. In the event that chapter membership decreases below 15 members, the chapter will be made aware of the deficiency and allowed a period of one year from the date of notice to increase membership to the required level before the official charter will be revoked.

### **Geographical Limit and Jurisdiction:**

A UAB Alumni Chapter can be located anywhere in the nation or world. However, as stated in the National Alumni Society Bylaws, in order to charter a chapter, there must be at least 150 alumni living in within a 50 mile geographic radius or at least 150 graduates from a particular constituent group in order for the chapter to be approved.

Once an alumni chapter has been approved, it has exclusive jurisdiction within its city, county, area, school, or program in all matters pertaining to the National Alumni Society. This requirement helps to prevent overlapping of club program and conflicts in mailing. It also gives each chapter greater identification.

### **Chapter Events and Activities:**

Each chapter will be required to hold a minimum of one (1) event per year, which must be a membership recruitment effort. Such an event can range from a seated dinner to an informal meeting, picnic, or trip to UAB to attend a sporting event. Creativity with these events is strongly encouraged and will guarantee a better turnout. Additional events are encouraged, but not required. Chapter events and activities should be reported to the UAB Alumni Affairs Office

through the chapter events form found in the reports section of this manual. See the Chapter Events and Activities section of this manual for additional planning tips and ideas.

**Financial Accounts:**

All financial accounts, with the exception of affiliate organizations, must be held within the UAB Alumni Affairs Office. Each chapter is provided its own account within the National Alumni Society upon receiving approval for chapter status. This money in this account can be used at the chapter's discretion so long as it is used for alumni related activities. All money received by the chapter for membership dues, funds raised, gifts, awards, or sponsorships that are given to the chapter, etc. will be deposited into this account.

At the point that a chapter is ready to begin raising money to provide scholarships to a local student, a separate scholarship account will be established that will allow for gifts to be made that are tax deductible. Additional provisions may need to be made based on the type of scholarship the chapter chooses to establish. However, a minimum of \$150 is required to be in this account at all times.

## Reports to be provided by the UAB Alumni Chapter

**Leadership Committee Report** – Each year, the current leadership committee members should be reviewed and rotated as necessary. If your chapter continues to govern with the original officer hierarchy, these elections should also take place on a yearly basis. It is recommended that this be done on either a calendar year or the fiscal year observed by the National Alumni Society, October 1<sup>st</sup> through September 30<sup>th</sup>.

**Upon appointment/election of new leadership, notification should be made to the Chapter Development Coordinator in the UAB Alumni Affairs Office immediately. (A copy of this Report is included in the forms section of the manual.)**

Throughout the year the Alumni Affairs Office must contact club leadership with important information relating to the chapter program, notices of special events, the university in general, athletics, etc. If our records are not up-to-date, the proper notification can't be made and ultimately can cause the chapter to suffer.

**Chapter Meeting Report** – Within 2 weeks of each activity or meeting of a UAB Alumni Chapter, a meeting report and attendance list are to be completed by a member of the leadership committee and forwarded to the Alumni Affairs Office. The timely completion of this report will greatly assist the Chapter Development Coordinator in publicizing outstanding chapter events as well as evaluating the growth and progress of the chapter. **(A copy of this Report is included in the forms section of the manual.)**

**Yearly Goals Report** – Within 45 days of the start of each new year, the Alumni Chapter should provide a completed goals report indicating both long and short term goals for the chapter. This will be a working document, but should be initially decided on by the leadership committee as a guide for the upcoming year.

**Club Project Report** – To be Determined.

**Annual Year End Report** – Within 30 days of the Alumni Chapter's year end, the Annual Year End Report should be submitted to the Chapter Development Coordinator in the UAB Alumni Affairs Office. All activities throughout the year should be included, as well as the chapter contact or outgoing chapter presidents comments on the accomplishments from the year.

## Reports to be provided by the UAB Alumni Affairs Office

**Membership Report** – Each quarter the chapter president/ contact person will receive a report from the Alumni Affairs Office listing the name and contact information for every member of the chapter. This report will only include alumni in your area that have elected to be a part of the chapter and will not include those in the area that are active in the National Alumni Society, but, have elected to be a part of another geographic or constituency based chapter or no chapter at all.

**Financial Report** - In addition to the membership report, the chapter president/contact person will receive a copy of the chapter's financial report as it has been accounted for through the National Alumni Society. This report will include any deposits made from chapter membership dues, funds raised from chapter activities and events, and gifts, awards, or sponsorships that have been given to the chapter.

For each member of the National Alumni Society that elects to be a part of the Alumni Chapter, the chapter will receive \$15 of the membership dues per individual or joint membership type. If a member elects to be a part of more than one chapter, a primary chapter must be identified and that chapter will receive the chapter portion of the membership dues.

**Local Alumni Information** – Upon request, a list can be provided to an alumni chapter in order to solicit new members. This list can include the name, mailing address, phone number, email, school, major, and graduation dates of all alumni in the local area that would be eligible for chapter membership. Before release of this information, an agreement must be signed by the chapter president/contact person stating that the information provided will not be used for any purpose outside of chapter business.

## Responsibilities of Leadership Committee Members

### Main Chapter Contact

- Maintains contact with Chapter Development Coordinator in the UAB Alumni Affairs Office.
- Arranges, plans, and presides over Leadership Committee or Board of Directors meeting
- Ensure chapter continuity by facilitating involvement from other chapter officers or leadership committee members.
- Delegates' responsibility for chapter activities.
- Guides the club in developing its potential.
- Attends leadership conferences or appoints a chapter representative to attend.
- Supports and encourages new and renewed membership in the National Alumni Society and the chapter.
- Prepares the Annual Year End Report.

### Additional Leadership Committee Members General Responsibilities

- Attend chapter-planning meetings.
- Lead or assist with chapter event coordination as needed.
- Lead and serve on various chapter committees as necessary.
- Support and encourage new and renewed membership in the National Alumni Society and the chapter.

### Responsibilities that will need to be assigned to a committee member include:

- Taking minutes of all chapter meeting.
- Provide membership updates to the Alumni Affairs Office upon notification.
- Establishing a budget for chapter activities and events.
- Forwarding monies raised at any chapter activity to the Alumni Affairs Office for deposit into the chapter's account.
- Provide information to the UAB Alumni Affairs Office to be included in the *e-Gazette* (published monthly) and *UAB Alumni Magazine* (published twice a year).

## Additional Committees

As an alumni chapter grows, more committees may need to be developed to assist the leadership committee in performing necessary duties. These committees can be added as necessary and can be made up of volunteer chapter members, but must be lead by a member of the general leadership committee. These additional committees may include:

### **Program Planning Committee**

- This committee completes the arrangements whenever a program is desired for a chapter activity. If a program involving anyone from the UAB Campus is planned, arrangements should be coordinated through the Alumni Affairs Office. **Any potential campus speakers MUST not be contacted directly by the chapter.**
- This committee should inform all other committees of the details of an activity or program so they can answer any questions club members or potential members may have.

### **Telephone Committee**

- It is the responsibility of this committee to call on alumni and friends who have not responded to invitations reminding them of the event and encouraging them to attend. This committee holds the key to the success of your chapter events. Personal phone calls DO increase attendance!
- This committee should keep records of those individuals who can't attend because of previous commitments, but are interested in chapter activities.
- The committee should also assist the Alumni Affairs Office by verifying/updating addresses as telephone contact is made with chapter members and reporting all changes to the Alumni Affairs Office.
- The National Alumni Society can occasionally assist this committee by allowing the chapter to use the Student Phone Banks to make event follow up calls.

### **Publicity Committee**

This committee should be made up of members that enjoys or is involved in communications related work. Specific responsibilities may include:

- Working with the Alumni Affairs Office to make sure that the events or activities are published in all available communication methods including:
  - the National Alumni Society website
  - the monthly *eGazette*
  - the biannual *UAB Alumni Magazine*
  - broadcast emails to your local chapter area
- Arranging for publicity prior to and following chapter activities.
  - Notifying local newspapers to run a short notice as least two (2) days prior to and after the event.
  - Contacting local radio and television stations for public service announcements advertising the upcoming meeting.
  - Requesting local press or appropriate news media coverage for the chapter event.



- Working closely with the Telephone Committee. This committee is vital to the program's success.

### **Membership Committee**

- One of the most important committees is the membership committee. This committee should explore ways of increasing National Alumni Society and chapter membership and should periodically conduct membership campaigns.
- This committee should work closely with the planning of the membership recruitment event that must be held annually.

### **Student Recruitment Committee**

- The main purpose of this committee should be to coordinate activities that promote UAB in the community to encourage potential students to attend UAB.
- Committee members will work closely with the Alumni Admissions Program, the Alumni Affairs Office, and the Admissions Office to represent UAB at local college fairs, student scholarship receptions, and student awards ceremonies.

Individual chapters may identify additional committees that need to be added based on the individual chapters needs. These chapters can be added so long as they support the long and short-term goals set by the chapter and further support the ultimate goals of the National Alumni Society and UAB.

## Seven Steps to an Effective Chapter Leadership Committee Meeting

1. Publish and distribute an agenda for the meeting at least one week prior to the scheduled meeting.
2. Start and end the meeting on time. You must respect the committee members' time.
3. Stick to the agenda.
4. See that all members of the leadership committee participate in discussion and planning.
5. Don't let any one member dominate the entire meeting discussion.
6. Ensure that assignments for follow-up actions are clearly understood.
7. Provide minutes in a timely fashion following the meeting.

## Planning the Chapters Alumni Events & Activities

Activities bring alumni together to learn, network, help the community, raise funds, for scholarships, and most importantly, have fun in the name of UAB! Local chapters or the National Alumni Society may sponsor activities. When the NAS hosts an event in the local chapter area, the chapter may be asked to assist. When the local club hosts events, primary planning rests with the local leaders with support available from the Alumni Affairs Office. The Alumni Affairs staff is ready to help make your event successful.

In planning your activities, keep in mind:

### **“What is your goal?” and “What kinds of event will help us reach our goal?”**

You must set your goals in order to decide what type of events you will want to host. Whether you are a new chapter or one that has been around for a while, you will always want to increase participation and membership. Some other goals that chapters have are to improve on student recruitment, scholarship assistance to local students, raise funds, or have more fun! The first few years after establishing a chapter are generally focused on increasing membership and awareness of the chapter and raising funds. Below is a list of goals that may help in planning:

- Increase Membership
- Raise Awareness of the Chapter
- Raise Funds
- Increase or implement scholarship assistance
- Improve or implement a student recruitment network
- Organize more social and networking events

The most important first step in hosting an event is communication your plans to the Chapter Development Coordinator in the Alumni Affairs Office. The Alumni Affairs Office needs at least five (5) weeks notice to produce a mailing for your event. However, it is never too early to call the Alumni staff to start planning an event. Some of the most successful chapters plan all of their events at one time and then modify that plan as necessary. In the “forms” section of this manual, an invitation request form has been included.

## Chapter Event & Activity Suggestions

UAB Alumni Chapter events and activities can take on one of many forms. Below is a list of ideas and suggestions that have been used in the past to draw a good turnout of alumni and friends and meet chapter goals.

### Event and Activity Ideas

**Buffet or Sit-Down Dinner:** Often preceded by a cocktail reception, this event usually features a speaker or a video as the main program.

**Picnic/Homemade Ice Cream Social:** Great for summer get-togethers for the whole family. This is also a good event for introducing potential UAB students to UAB alumni. Fun and friendship are the main goal of this event.

**Forum /Seminar:** Informational event on a selected topic. This type of event is popular with business people and selected segments of your alumni population.

**Luncheon Meeting:** Work with a civic club and ask a UAB professor to be your guest speaker.

**Reception/Happy Hour:** Great social/networking get-together with minimal programming. This event can be used as a standing monthly event at a local restaurant in order to get area alumni familiar with each other and the local chapter. This can also be used to as fund raising event by charging a cover charge to alumni for entry into the event.

**Wine Tasting Parties:** By contacting a local wine distributor, you can host a wine tasting for your alumni chapter. This is a fun way to draw alumni of all ages to an event for socializing and networking.

**TV Viewing Party:** This is perhaps one of the most popular chapter activities during basketball season. At a home, sports bar or hotel, it's always fun to watch the Blazers! Watch parties are fairly easy to organize and generate a tremendous amount of enthusiasm and camaraderie. It is best to publicize your gathering time for games as "thirty minutes prior to tip-off because television often preempts the original starting time. It is generally best to choose and stick with one TV watch location each athletic season to avoid confusion. Often the restaurant or bar and grill that you chose will be more than happy to make special accommodations for your chapter perhaps even make a contribution to your chapter's account.

**Bus trip/ Caravan:** Trips to UAB for athletic events or to see a theatre production or museum. Trips to away games can be a lot of fun and who doesn't like a ROAD TRIP!

**Golf or Tennis Tournaments:** Sponsor these types of events in the spring for the highest interest and response. See advice from the golf course for planning information. The event should be open to the public for great participation with a discounted rate offered to alumni chapter members. This would be a good event to hold annually to build a solid reputation.

**Casino Nights:** These events can be as simple or elaborate as the chapter would like for them to be. They typically consist of silent auctions, gambling tables, live cash auctions, live chip auctions or a raffle. A live band or disc jockey can be present to make it fun for participants. Dinner or heavy hors d'oeuvres can be service. These events need to be planned well in advance, and they require a strong commitment from organized volunteers.

\*\*The above social events will also be able to serve as great membership recruitment events in order to help meet your goal of increasing membership.

If a UAB campus speaker is required for your chapter's event, the Alumni Affairs Office will aid in contacting and securing the appropriate speaker and making arrangements for the speaker to attend the event.

**NOTE: A chapter should NOT contact a coach or other university official concerning a UAB Alumni Chapter event without the approval of the Alumni Affairs Office. This only complicates scheduling procedures and can cause undue stress on the speaker.**

## Things to Consider in Planning an Event

### **When Considering a Site:** (Factors to Consider)

- Distance Traveled – Select a centrally located site relative to the concentration of UAB alumni and friends.
- Accommodations – Enough space should be provided for the type of function being planned, whatever the format. In the case of buffets, be certain enough serving lines are provided to avoid long line delays. Please consider allowing guest to do down both sides of the buffet. Invited guests should start the buffet line.
- Resource Needs – Depending on the type of function, certain resources or equipment may be needed. Consider such things as a podium and microphone for speakers, registration and membership tables, electrical outlets, VCR, television monitor, and extension cords if a video is to be shown.
- Parking privileges or spaces.
- Reputation of food served.
- Service of Establishment.
- Liquor license and liability – (Please review the hot liquor liability form included in this manual.)
- Cost of meals and other services.

### **Establishing the Cost:**

- Each chapter function should be financially independent. A chapter can request sponsorship from the National Alumni Society. In order to request this sponsorship, a letter must be submitted the president of the NAS in time for the board to review the request and make a decision regarding sponsorship prior to the event date. In addition, see the “National Alumni Society Assistance” page to see other support that is available for chapter events.
- In many cases, a nominal fee may be added to the cost of each admission or meal ticket. This may be used to defray the expenses such as postage, decorations, complimentary meals and drinks for guest or other costs the chapter leadership feels is justified.
- Where a meal is planned or a cost will be incurred by the alumni or friend, the cost factor should be carefully considered and a price established that would not discourage younger alumni.

## Checklist for Planning a UAB Chapter Event

- Week of the event:** \_\_\_\_\_ Make arrangements with any special guests that may be attending the event (i.e. speakers) on when and how they will arrive at the event.
- Day of the event:** \_\_\_\_\_ Arrangement of Meeting Room  
\_\_\_\_\_ Podium and/or microphone  
\_\_\_\_\_ Resource equipment (VCR, television, extension cords, etc., if needed)  
\_\_\_\_\_ Registration/membership table (Promotional information for the National Alumni Society)  
\_\_\_\_\_ Display Table, if needed  
\_\_\_\_\_ Nametags  
\_\_\_\_\_ Bar facilities, if needed  
\_\_\_\_\_ Any plaques, awards or door prizes, if applicable  
\_\_\_\_\_ Decorations/ Flowers  
\_\_\_\_\_ Check with Management of facility  
\_\_\_\_\_ Photographer
- Thirty Minutes Before:** \_\_\_\_\_ All chapter leadership committee members should be available to greet chapter members and guests.
- Follow-Up Duties:** \_\_\_\_\_ Send Chapter Meeting Report and Attendance Report if an Alumni Affairs Office representative is not attending the event.  
(within one week) \_\_\_\_\_ Follow-up publicity. Send pictures to the Alumni Affairs Office and send pictures and a write-up to your local newspaper.
- Within Two Weeks:** \_\_\_\_\_ Meet with chapter leadership committee to evaluate the meeting and make record of suggestions for the next time.  
\_\_\_\_\_ Complete the Meeting and Event Evaluation Form and mail it into the Chapter Development Coordinator in the Alumni Affairs Office.

\*\*At an alumni event, the chapter leadership committee serves as the official hosts. This group should meet and greet attendees, and direct them to the registration table. The registration table should consist of a sign in sheet, payment for the event (if there is a charge), receipt of a nametag, and pick-up of any free items. Once everyone has had a chance to mingle, a member of the leadership committee calls the group to order and the official program should begin.

## National Alumni Society Assistance for UAB Alumni Chapters

The UAB National Alumni Society developed the UAB Alumni Chapter Program in an effort to keep the thousands of UAB alumni and friends connected with UAB after graduation whether they move only a few miles away or thousands of miles across the country or globe. In an effort to support all of our UAB volunteer efforts, the services outlined below are offered to each new and existing chapter.

**Alumni List** – A list of names including mailing addresses, phone numbers, emails, school major and graduation dates of all alumni living in your designated chapter area will be provided upon request. Chapter leaders are responsible for assuring the confidentiality of this list and must sign a privacy agreement before the list will be released. This list can be shared with leadership committee members, but access should not be extended past those that need the list for official chapter business.

**Chapter Mailings** – The National Alumni Society will provide each chapter with one mailing to its entire constituency each fiscal/calendar year. This mailing should be reserved for the chapter's largest event that will include membership recruitment as one of its main objectives. Additional mailings may be coordinated through the Alumni Affairs Office, but printing and postage costs will be the responsibility of the chapter. Any special requirement for a mailing outside of the standard invitation/postcard/brochure will be the complete responsibility of the chapter.

For assistance with mailings from the Alumni Affairs Office, the Chapter Development Coordinator must be notified a minimum of 5 weeks prior to the event to allow adequate time for design, approval and mailing distribution.

If the chapter would like to handle its own mailing, the Alumni Affairs Office will provide one set of mailing labels per quarter to the chapter. These will only be distributed upon request.

**Financial Assistance** – The National Alumni Society is very proud of the extensive Alumni Chapter Program. In order to assist as many chapters as possible with their various events and activities, the NAS offers sponsorship opportunities to assist with financial obligations. In order to receive these funds, a chapter must submit a written letter to the current president of the NAS describing the event, the event's purpose, and the sponsorship amount requested. The letter will be submitted to the Board of Directors for discussion and approval. Chapters in their first two years of operation will be provided adequate funding for events until the chapter account can be established and membership recruitment can take place.

**Program Speakers** – The Chapter Development Coordinator and the Alumni Affairs Office will assist with any UAB Campus speakers that a chapter would like to host for a particular event. These details must be handled through the Alumni Affairs Office. No campus speaker should be contacted directly by the chapter.



**Items for Chapter Events** – Nametags, stickers, UAB balloons, giveaways, UAB National Alumni Society literature, decorative materials, etc., will be provided to a chapter if requested. In addition, each chapter will receive a vinyl banner with their chapter's name on it if requested.

**Media Materials** – The Alumni Affairs Office will work with the UAB Media Relations Department in assisting an alumni chapter with getting information out to the local media.

**Publicity** – The National Alumni Society and the Alumni Affairs Office have an extensive amount of free publicity options for alumni chapters to take advantage of. Each publicity options require adequate time for posting and inclusion. See the individual methods for due dates and posting delays.

**UAB National Alumni Society website:**

Each chapter has its own page that is accessible from the front page of the UAB National Alumni Society website. This information can be continuously updated at the chapter's request with upcoming news, events, and ways for alumni in the area to get involved.

Upon submission of this information, typically one week must be allowed to upload the information.

If the chapter chooses to create their own website, a link can be placed on this site to direct alumni to the independent site.

***Alumni eGazette:***

Each month the Alumni Affairs Office produces an electronic newsletter that is distributed to over 19,000 alumni and friends with up-to-date information on alumni activities both locally and nationally, updates on exciting things going on around campus, and other stories that may be of interest to UAB alumni.

For your chapter's information to be included, it must be submitted to the Chapter Development Coordinator no later than the first of each month. The publication is written, designed and distributed as close as possible to the 15<sup>th</sup> of each month.

**Broadcast Email:**

The Alumni Affairs Office will provide each alumni chapter with one broadcast email to its entire constituency every quarter. This email can range from a request for membership to announcing an event. Additional broadcast emails may be available on a case-by-case basis depending on the broadcast email calendar.

In order for a broadcast email to be sent out by the Alumni Affairs Office a minimum of two weeks notice is required.

***UAB Alumni Magazine:***

The *UAB Alumni Magazine* is produced twice annually and is typically distributed in February and September. Each chapter has a reserved space for up to 350 words and 1-2 chapter photos.

Submissions for this publication are due at least 4 months in advance (November and June). Each chapter will receive call for submissions around the due date for each publication.

**The Alumni Affairs Office will also provide advice and counsel in structuring any chapter efforts or programs, such as:**

- Scholarship Programs
- Setting up Scholarship Accounts or Endowments
- Various Committees (Such as membership or publicity)
- Telephone Reminders for Large Events
- Community Service Projects
- Special Events

Continuous contact with the Chapter Development Coordinator in the Alumni Affairs Office is critical to making the most of the services offered to UAB Alumni Chapters. If you need additional information, ideas, answers to questions, or support please don't hesitate to call on our office at any time. **WE ARE HERE FOR YOU!!!**

## Petition for Chapter Status

As a member in good standing with the UAB National Alumni Society, I request of the UAB National Alumni Society the creation of a (n) \_\_\_\_\_ Alumni Chapter.

	<b>PRINT NAME</b>	<b>SIGNATURE</b>	<b>DAY TIME PHONE #</b>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			
21.			
22.			
23.			
24.			
25.			

## Sample Letter of Application for Chapter Status

**Date of letter**

**Mr. /Ms. Chapter Contact**

**111 Any where Lane**

**UABtown, UAB 11111**

Dear Alumni Board of Directors:

I am writing this letter to formally request that the UAB National Alumni Society recognize the formation of the **name of the chapter** Alumni Chapter.

A meeting was held on **whenever your meeting was held**, to discuss plans for establishing a chapter, and to gauge our level of interest. We are submitting a petition with **the number of signatures** active alumni signatures. We all feel that we will be able to create a strong and active chapter in **UAB Town**.

Thank you for your support thus far, and we look forward to moving ahead with this venture.  
Thank you.

Sincerely,

**Chapter Contact's Name and Signature**

**Remember to send this letter along with the petition form!**

## Sample Letter to the Dean for Constituent Chapters

### Date of letter

### Mr. /Ms. Chapter Contact

111 Any where Lane  
UABtown, UAB 11111

Dear Dean Dean's Name:

I am writing this letter to ask for your support in forming the name of the chapter Alumni Chapter. As a constituent chapter of the UAB National Alumni Society, our organization will sponsor events that will promote the Society, our chapter, and the school of name of the constituency.

A meeting was held on whenever your meeting was held, to discuss plans for establishing a chapter, and to gauge our level of interest. We are submitting a petition with the number of signatures active alumni signatures. We all feel that we will be able to create a strong and active chapter for your constituency graduates.

Thank you for your support thus far, and we look forward to moving ahead with this venture. Please feel free to give me a call at your telephone number to discuss this matter further. Thank you.

Sincerely,

### Chapter Contact's Name and Signature

**Remember, this letter must go to the dean and be approved before the letter of application for chapter status is presented to the NAS Board of Directors.**

UAB Alumni Chapter Leadership Committee Report

Name of Chapter: \_\_\_\_\_ Effective as of: \_\_\_\_\_  
(Please include full names and class year (if applicable))

Lead Chapter Contact: \_\_\_\_\_ Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: (H) \_\_\_\_\_ (W) \_\_\_\_\_ Fax \_\_\_\_\_

Preferred Email Address: \_\_\_\_\_  
\_\_\_\_\_

Committee Member: \_\_\_\_\_ Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: (H) \_\_\_\_\_ (W) \_\_\_\_\_ Fax \_\_\_\_\_

Preferred Email Address: \_\_\_\_\_  
\_\_\_\_\_

Committee Member: \_\_\_\_\_ Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: (H) \_\_\_\_\_ (W) \_\_\_\_\_ Fax \_\_\_\_\_

Preferred Email Address: \_\_\_\_\_  
\_\_\_\_\_

Committee Member: \_\_\_\_\_ Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: (H) \_\_\_\_\_ (W) \_\_\_\_\_ Fax \_\_\_\_\_

Preferred Email Address: \_\_\_\_\_  
\_\_\_\_\_

**(Continued on next page.)**

Committee Member: \_\_\_\_\_ Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: (H) \_\_\_\_\_ (W) \_\_\_\_\_ Fax \_\_\_\_\_

Preferred Email Address: \_\_\_\_\_

---

Committee Member: \_\_\_\_\_ Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: (H) \_\_\_\_\_ (W) \_\_\_\_\_ Fax \_\_\_\_\_

Preferred Email Address: \_\_\_\_\_

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Committee Member: \_\_\_\_\_ Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: (H) \_\_\_\_\_ (W) \_\_\_\_\_ Fax \_\_\_\_\_

Preferred Email Address: \_\_\_\_\_

**Please list the names of outgoing leadership committee members below.**

Please complete and return to:  
UAB Alumni Affairs Office  
Attn: Paige Price  
ALUM Building, 1720 2<sup>nd</sup> Avenue South  
Birmingham, Alabama 35294-4555  
Fax: (205) 934-3926  
Phone: (205) 934-3555  
Email: [cpprice@uab.edu](mailto:cpprice@uab.edu)

## UAB Alumni Chapter Goals Report

NAME OF CHAPTER: \_\_\_\_\_

DATE: \_\_\_\_\_

LEAD CHAPTER CONTACT: \_\_\_\_\_

Short Term Goals: (To be achieved during the current year under the current leadership committee)

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

Long Term Goals: (5 year plan for chapter objectives)

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

**This report should be completed within six weeks of the beginning of the year  
and remitted to the address below.**

Please complete and return to:  
UAB Alumni Affairs Office  
Attn: Paige Price  
ALUM Building, 1720 2<sup>nd</sup> Avenue South  
Birmingham, Alabama 35294-4555  
Fax: (205) 934-3926  
Phone: (205) 934-3555  
Email: ccprice@uab.edu



Chapter Yearly Plan  
*Due by the first day of the chapter's fiscal year.*

Name of Chapter: \_\_\_\_\_

Lead Chapter Contact \_\_\_\_\_ Date Submitted \_\_\_\_\_

GOALS FOR THE YEAR

State your chapter goals for the year \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Event #1

Name of Event \_\_\_\_\_

Tentative or set date \_\_\_\_\_

**Goal that will be met by having this event** \_\_\_\_\_

Event #2

Name of Event \_\_\_\_\_

Tentative or set date \_\_\_\_\_

**Goal that will be met by having this event** \_\_\_\_\_

Event #3

Name of Event \_\_\_\_\_

Tentative or set date \_\_\_\_\_

**Goal that will be met by having this event** \_\_\_\_\_

(Continued on next page.)

Event #4

Name of Event \_\_\_\_\_

Tentative or set date \_\_\_\_\_

**Goal that will be met by having this event** \_\_\_\_\_

Event #5

Name of Event \_\_\_\_\_

Tentative or set date \_\_\_\_\_

**Goal that will be met by having this event** \_\_\_\_\_

Event #6

Name of Event \_\_\_\_\_

Tentative or set date \_\_\_\_\_

**Goal that will be met by having this event** \_\_\_\_\_

Event #7

Name of Event \_\_\_\_\_

Tentative or set date \_\_\_\_\_

**Goal that will be met by having this event** \_\_\_\_\_

Event #7

Name of Event \_\_\_\_\_

Tentative or set date \_\_\_\_\_

**Goal that will be met by having this event** \_\_\_\_\_

Please complete and return to:  
UAB Alumni Affairs Office  
Attn: Paige Price  
ALUM Building, 1720 2<sup>nd</sup> Avenue South  
Birmingham, Alabama 35294-4555  
Fax: (205) 934-3926  
Phone: (205) 934-3555  
Email: ccprice@uab.edu

## Invitation Information Form

*Please mail or fax this form in **six weeks** prior to your event date. If you will have more than one date on your mailer, please submit six weeks before your earliest event.*

Name of Chapter \_\_\_\_\_

Name of Event(s) \_\_\_\_\_

Date (s) \_\_\_\_\_

Location \_\_\_\_\_ City \_\_\_\_\_

Time \_\_\_\_\_ Speaker \_\_\_\_\_

Cost \_\_\_\_\_ Menu \_\_\_\_\_

RSVP Date \_\_\_\_\_ By Phone    By Mail

RSVP to (Name) \_\_\_\_\_

RSVP to (Email or Phone Number) \_\_\_\_\_

Attire \_\_\_\_\_

Contacts for more information \_\_\_\_\_ Phone Number \_\_\_\_\_

Make checks payable to \_\_\_\_\_

Mail checks to \_\_\_\_\_

Mail this piece to:

NAS Actives Only    All Good Addresses

Special items requested \_\_\_\_\_

Description of what will happen at your event \_\_\_\_\_

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Please complete and return to:  
UAB Alumni Affairs Office  
Attn: Paige Price  
ALUM Building, 1720 2<sup>nd</sup> Avenue South  
Birmingham, Alabama 35294-4555  
Fax: (205) 934-3926  
Phone: (205) 934-3555  
Email: [cpprice@uab.edu](mailto:cpprice@uab.edu)

Meeting and Event Evaluation Form

*Due 7 days after each event*

Name of Chapter: \_\_\_\_\_

Name of Event Held: \_\_\_\_\_

Date of Event: \_\_\_\_\_ Location of Event: \_\_\_\_\_

Time of Event: \_\_\_\_\_ Cost (if applicable) \_\_\_\_\_

Speaker (if applicable) \_\_\_\_\_ Attendance: \_\_\_\_\_

Describe the accommodations and facilities for the meeting and if they contributed or took away from the event's success (location, meal, parking, lighting, etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What publicity and planning efforts were used to increase attendance at the meeting or event?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please comment on the Office of Alumni Affairs' assistance. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What areas of the event were the most successful? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What steps will be taken to make the next event better? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other comments and observations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

General Evaluation: *(In your opinion, circle the one that best describes the event)*

1	2	3	4	5	6	7	8	9	10
Very Poor									Excellent

Signed: \_\_\_\_\_ Date \_\_\_\_\_

Please complete and return to:  
UAB Alumni Affairs Office  
Attn: Paige Price  
ALUM Building, 1720 2<sup>nd</sup> Avenue South  
Birmingham, Alabama 35294-4555  
Fax: (205) 934-3926  
Phone: (205) 934-3555  
Email: [cpprice@uab.edu](mailto:cpprice@uab.edu)

UAB National Alumni Society  
Chapter Funds Request Form  
*Allow two weeks for processing.*

Name of Chapter: \_\_\_\_\_ Date of Request: \_\_\_\_\_

Contact person: \_\_\_\_\_ Telephone: \_\_\_\_\_

Purpose: \_\_\_\_\_  
(Please provide documentation, e.g. catalog, receipt)

Location of Event:  
\_\_\_\_\_

Amount requested: \_\_\_\_\_

\_\_\_\_ Please issue a check payable to: \_\_\_\_\_

Mail to: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_ Enclosed is a bill/invoice. Please pay and send a copy to me.

Signature of requestor: \_\_\_\_\_

Note: If a check is being issued to an individual that is not a UAB employee, the individual will need to complete a W-9 form that can be provided by the Alumni Affairs Office.

Please complete and return to:  
UAB Alumni Affairs Office  
Attn: Donna Hardiman  
ALUM Building, 1720 2<sup>nd</sup> Avenue South  
Birmingham, Alabama 35294-4555  
Fax: (205) 934-3926  
Phone: (205) 934-3555  
Email: djh2014@uab.edu

Annual Year End Report

For the Year \_\_\_\_\_

*Due no later than the last day of the chapter's fiscal year.*

Name of Chapter: \_\_\_\_\_

Submitted by: \_\_\_\_\_

Total Active Members in Chapter: \_\_\_\_\_

**CHAPTER ACTIVITIES**

<u>Event Type</u>	<u>Date</u>	<u>Place</u>	<u>Attendance</u>	<u>Amt. Spent</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

TOTAL: \_\_\_\_\_

<u>Fundraising Efforts</u>	<u>Date (s)</u>	<u>Amount Raised</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**(Continued on next page)**

Year End Report Questionnaire

What kind of membership drive did your chapter participate in this year, and how many new members resulted? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What does your chapter do to recognize alumni in your area who make special contributions to the University or community? (E.g. nominate candidates for the Distinguished Alumna/Alumnus Award or Society Board of Directors)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What public relations and publicity programs does your chapter participate in to increase its attendance at functions and visibility in the community? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please tell us how you view the Alumni Office's role in assisting your chapter. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

General evaluation of the year (please include any comments, positive or negative, on your chapter's activities). \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please complete and return to:  
UAB Alumni Affairs Office  
Attn: Paige Price  
ALUM Building, 1720 2<sup>nd</sup> Avenue South  
Birmingham, Alabama 35294-4555  
Fax: (205) 934-3926  
Phone: (205) 934-3555  
Email: [cpprice@uab.edu](mailto:cpprice@uab.edu)



Mailing List/Email List Confidentiality Agreement

The UAB \_\_\_\_\_ Alumni Chapter understands and agrees that the membership/alumni list(s) provided by the UAB Alumni Affairs Office shall be used exclusively for the task of disseminating information to members and alumni in the chapter geographic area, in order to recruit attendance for chapter related events and activities and shall not be used for any other purpose without written permission from the UAB Alumni Affairs Office and that this list will not be distributed to any outside agencies to include any outside vendors. The chapter further agrees that upon completion of the present task, as described herein, it will return to UAB any list(s) provided by UAB, and will not retain a copy of the list(s) in any form or format whatsoever.

In Witness Whereof, the authorized representatives of the Company and UAB \_\_\_\_\_  
\_\_\_\_\_ Alumni Chapter have signed this Agreement on this \_\_\_\_\_  
day of \_\_\_\_\_ 20\_\_\_\_, with the intent to be bound by the terms recited herein.

For UAB Alumni Affairs Office:  
  
\_\_\_\_\_

By: \_\_\_\_\_  
  
Title: \_\_\_\_\_

For UAB \_\_\_\_\_  
Alumni Chapter  
  
\_\_\_\_\_

By: \_\_\_\_\_  
  
Title: \_\_\_\_\_

Please complete and return to:  
UAB Alumni Affairs Office  
Attn: Paige Price  
ALUM Building, 1720 2<sup>nd</sup> Avenue South  
Birmingham, Alabama 35294-4555  
Fax: (205) 934-3926  
Phone: (205) 934-3555  
Email: [cpprice@uab.edu](mailto:cpprice@uab.edu)