



THE ALUMNI ASSOCIATION  
*of the* **University of Colorado at Boulder**

**Chapter and Affinity Group Manual**

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### **Appendix (to be added later)**

- **Staff liaison map**
- **Confidentiality agreement**
- **Forever Buffs information**

## How to Start a Regional Chapter

The success of a new chapter depends on the commitment of the local volunteers working in partnership with the Alumni Association staff. The process for establishing a chapter begins with these steps:

1. Establish a geographic area for the chapter with your Alumni Association staff liaison.
2. In order to maintain a vital chapter, it is important to have a critical mass of 200 people. If your area lacks the critical mass necessary to form a chapter, please contact your staff liaison for your area to discuss other opportunities to connect to CU-Boulder.
3. Your staff liaison will run a report to determine the number of alumni living in the designated chapter area and the number of e-mail addresses available for the area. This will help determine initial communication with local alumni.
4. Develop a survey questionnaire with your staff liaison to gauge interest, activities and willingness to serve on the chapter leadership team. You may also want to pre-identify a planning meeting or kick-off event and publicize this in the questionnaire.
5. Identify a core group with whom you can have a few informational meetings to gauge interest and potential membership in the proposed organization.
6. Plan the first meeting or event to select board members and chapter officers and establish the purpose and mission of the chapter. Leadership within a chapter may vary from co-leaders to more of a formal set up of president and vice president, etc.

# Chapter Event Ideas

## Event planning advice

- Scheduling Events
  - When deciding on a date and time be mindful of holidays (including religious holidays) and external factors like traffic. Try to pick a date/time that is convenient for the majority of the people you hope to attract to the event. If possible, set the date for your event at least three months in advance to allow for adequate planning and publicity.
- Location
  - Consider a location that appeals to a broad demographic such as a winery, museum or historic site. Location should be easily accessible by major roads. Please keep in mind that the location should also be family friendly depending on the event.
- Alcohol
  - It is the chapter's responsibility to ensure that if alcohol is served at the event that it is served legally and responsibly. Be sure that proper identification is provided by attendees who would like to consume alcohol. Consider having events at locations where a licensed bartender is present.
  - Be sure to promote drinking responsibly at events.

## Tips for chapter events

- Host a variety of events that appeal to a wide range of members – offer alumni an experience they can't get elsewhere.
- Take advantage of what is unique about your city or community.
- Keep your event cost reasonable, especially if trying to reach younger alumni.
- Keep your program as brief as possible. An hour-long program with a guest speaker or other activities plus an hour for dinner is generally long enough.
- Don't try to accomplish everything in one event! Your attendees will become restless with a long, drawn out event.
- You can never have enough help! Make sure to have a committee of volunteers to help with the planning and promotion. Also make sure to have enough volunteers on hand at the event.

## **Ideas to help kick start your presence and outreach to fellow CU alumni in your area!**

### New chapter fund raising

New chapters should look into having events that can help bring in some money to support the chapter. Events also should help create awareness of the chapter in your area. For ideas for start-up event ideas please contact your Alumni Association office liaison.

### **CU Buffs watch parties**

- Watch parties are an opportunity for fellow alumni to gather together and show their CU spirit by cheering on the Buffaloes.
- The CU-Alumni Association provides chapters with a watch party kit full of CU memorabilia to use to decorate and have giveaways. The kit is free of charge to the chapter. However we do ask that the chapter leader informs us of the watch party location. A family friendly restaurant/bar would be a preferred location for such an event. For noise purposes a restaurant with a separate room available for the game would develop a better relationship with the restaurant and fellow patrons.
- A small entrance fee (around \$5-10 per adult guest) could help bring in funds for the chapter.
- Watch party audiences are usually very diverse, from young alumni to families and older alumni. This event tends to work with all sizes of chapters.

### **Wine tasting/ brewery tour**

- Wine tasting helps create a more relaxed atmosphere while allowing for networking among alumni.
- Hold at a local winery with a licensed bartender.
- Try to keep entry cost to alumni at a decent rate. Some wineries have free wine tasting events during the week.

### **Museum and zoo outings**

- Family events help develop alumni ties. Choose a weekend date that allows for most chapter families to attend.
- If the museum or zoo is already having themed events such as spring zoo babies, holiday decoration, etc. such events can make the outing more attractive and easier to advertise.
- Contact your local zoo or museum to see if they have specials for large groups.
- If possible have a pot luck style lunch and come together as a group sometime during the trip to promote community within the chapter.

### **Cooking Classes/ New Restaurants**

- Search in your area to see if a local culinary school or restaurants offer cooking classes.
- If possible block one class for chapter members only.
- Go as chapter members to a new restaurant in town.
- These are great events for adults.

### **Attending a sporting event in your area**

- Many sports teams are happy to work with groups to get tickets at discounted prices or group seating- i.e. NBA, NHL, MLB minor league baseball, arena league football, major league soccer.

- Meet before or after the game at a local bar or restaurant or tailgate and bring your own food to grill.
- CU-Alumni Association highly recommends that the chapter have a bank account with funds in order to insure that if the chapter decides to purchase tickets and then sell them to chapter members, all tickets are paid in full. Also see if chapter members can buy directly from the sports team.

### **Volunteer events**

- Volunteer for National Alumni Admission Assistance Program (NAAAP)
  - Sign up at [cualumn.org](http://cualumn.org) page as a volunteer.
  - Assist the Alumni association staff member at fall admissions recruiting events.
- Attend hotel programs designed to bring CU-Boulder to your community, greet prospective students and their parents and share your Boulder experience.
- Work with Habitat for Humanity
  - Some areas have competitions that pit schools against each other – this would be a great way to interact with other alumni chapters in the Big 12 Conference.
- Participate in community clean-up day/Adopt-a-road
  - Please make sure that chapter members have adequate safety gear such as latex hand gloves and orange vests if near a road.
- Participate as a chapter in a local walk or run to support a charity
  - Get a group together to run/walk and raise money for a good cause.
  - Train as a group for the race.
  - Examples: Race for the Cure, March of Dimes, diabetes and heart disease fundraisers.

### **Summer send off**

- Host, fund, or assist with local Send-Off activities for incoming CU-Boulder students and their parents (informal BBQ's or socials)
- This is an opportunity to meet new students and their parents in your area.
- Inform parents and students of the great opportunities CU has to offer.
- Create a relationship with CU parents.
- Barbecues or picnics are a good way to engage new students and their parents.
- Watch party locations also are a good place to host these events since a relationship already exists with the location's management.
- Don't forget to contact Joyce Kinde at [parents@colorado.edu](mailto:parents@colorado.edu) from CU Parent's Association.

## **Emailing Alumni**

### **Welcome to Harris**

Harris is an e-mail marketing tool that the Alumni Association utilizes to contact our alumni and keep them informed about Alumni Association events and programs. Chapter leaders are allowed access to this tool to contact local alumni, to garner interest and market their events.

**Step 1:** Send a signed copy of the confidentiality agreement to Scott Hellmuth at the Alumni Association. The confidentiality agreement states that you will not use your access to private information about our alumni for purposes outside of your chapter's business. <LINK TO PDF>Click here to download the confidentiality agreement in PDF format. Once you have reviewed and signed the agreement, you may fax, mail or e-mail the agreement to Scott Hellmuth. You will be notified when your signed confidentiality agreement has been received.

Fax: 303-492-6799 ATTN: Scott Hellmuth

Mail: Scott Hellmuth, CU-Boulder Alumni Association, 459 UCB, Boulder, CO 80309

Email: [scott.hellmuth@colorado.edu](mailto:scott.hellmuth@colorado.edu) (please include scanned agreement as an attachment)

**Step 2:** Obtain your username and password to access Harris. Once Scott Hellmuth has received your signed confidentiality agreement, he will setup your account with Harris and assign a username and password.

**Step 3:** Login and get started! Once your username and password has been assigned, Scott Hellmuth will send you a How-To document with detailed instructions to help you navigate the Harris Email Tool.

## Sample E-mail to Start a Chapter

You are receiving this e-mail because you are a University of Colorado graduate living in the Chico, California area.

Recently, Jon Hilbert contacted us about the idea of starting an alumni chapter in the Chico area. We are always very willing to find ways to bring alumni together, particularly in helping to start a local chapter. An alumni chapter can be a wonderful means to share common history, stay abreast of activities at the university, and enjoy the company of other Buffs.

If you are interested in having a local chapter established, please contact Jon via e-mail at [bonandjon@gmail.com](mailto:bonandjon@gmail.com). He will follow up with you to determine the level of interest in the chapter and what the chapter might do if sufficient interest exists.

Please take time to respond to Jon and let him know your thoughts. Whether a chapter is formed or not, I hope you are all doing well and that you know to call on us if we can ever be of assistance to you.

Go Buffs!

Ron Stump  
Interim Executive Director of the Alumni Association

## How to Open a Local Bank Account for your Chapter or Affinity Group

Having a local bank account allows chapters to operate independently from the Alumni Association. As stated in the relationship agreement, chapters can not use University accounts for their events and programs.

The following are instructions on how to open a bank account at Elevations Credit Union in Boulder. Rules and requirements may vary by state and financial institution.

1. Apply for an EIN number for your chapter at <https://sa1.www4.irs.gov/modiein/individual/index.jsp>. This will allow you to set up the bank account in your chapter or affinity group name instead of under your personal information. We recommend you become a social/savings club under the identity section. Suggested official chapter names should be something like CU Alumni MY CITY Chapter.
2. Register your chapter with the state of Colorado at <http://www.sos.state.co.us/biz/FileDoc.do>. Choose "form a new non-profit corporation" and enter the official name used during the EIN application process. After you click the entity, you will have spaces to enter the entity information: names, addresses, officers, registered agent, etc. You do not need to have bylaws prior to this and you do not need to have a hard copy of any articles of incorporation. The website will allow you to print the articles at the end and the "form" articles are sufficient.
3. Once you have completed steps 1 and 2 you are ready to open a business bank account for your chapter. You will need at least 2 signers on the account. Elevations Credit Union is willing to waive the \$7 monthly fee for CU alumni chapter accounts.

## **Chapters and Affinity Groups Relationship Agreement**

This document describes CU-Boulder Alumni Association Chapters and Affinity Groups and their relationship with the University of Colorado at Boulder Alumni Association, including support from the Alumni Association. Chapters and Affinity Groups are separate entities comprised of alumni, family and friends who come together in camaraderie to express their CU Buff spirit and loyal support of the University. Expectations of Chapters and Affinity Groups described within this document are based on practices at other Big XII schools. Before finalizing these expectations, the document will be reviewed with campus officers, University Counsel, Alumni Association Board of Directors members, Alumni Association staff and selected current chapter officers.

Chapters are “registered” by the University of Colorado at Boulder Alumni Association (CUBAA) through a set of alumni guidelines and best practices. Chapters are asked to notify CUBAA of their purpose and interests and return a signed confidentiality agreement. Chapters are encouraged to have their own bank accounts and collect their own revenues. They do not use University accounts, must have University approval for the use of University trade marks and are not covered under the University’s insurance.

The following events and services may be undertaken by area chapters:

- Build loyalty to the University of Colorado at Boulder
- Welcome alumni who move into the chapter’s area
- Hold athletics watch parties
- Promote new student admissions efforts
- Hold summer send offs for new freshman and transfer students in their area
- Promote career networking
- Host events when the CU-Boulder Chancellor, the CU President or other University officials, faculty or athletic representatives are in the area
- Encourage annual giving and scholarship fundraising to the University through the CU Foundation

The CUBAA provides the following services, donations and assistance for chapters:

- A CUBAA staff liaison who will serve as a contact and visit the chapter at least once every two years.
- Website assistance and posting, mailings (limited to within a set dollar amount) and blast e-mails
- Buff spirit items for door prizes and use at events
- A set of guidelines and best practices in managing the chapter and its activities

- The opportunity to purchase football tickets through the athletic department
- A “Chapter Leadership Weekend” held every two years for the purpose of re-energizing the officers, recognizing outstanding Chapters and enhancing the Chapter’s activities.

Except for events such as a Chancellor’s reception or a National Council Admissions program where the chapter is asked to host or participate, CUBAA does not assume liability for the chapters’ activities, finances and actions, nor does it absorb the upfront charges for chapter events.

## **AFFINITY GROUPS**

University of Colorado alumni have formed affinity groups that are not based on geographical area. Rather, their relationship is based on a common background and/or a service mission. Affinity groups operate under the Chapter guidelines. The groups currently include:

- Black Alumni Society
- Hispanic Alumni Association
- Asian American Alumni Association (re-forming)
- American Indian Alumni Association
- Colorado Army ROTC
- Director’s Club
- Gay, Lesbian, Bisexual & Transgender Alumni Chapter (GLBTA)
- CU Military Veterans Alumni Society
- National Alumni Admissions Assistance Program (NAAAP)

## **What the CUBAA cannot do for chapters and affinity groups**

Due to University policy and financial constraints, the CUBAA cannot do the following for Chapters and Affinity Groups:

- Sign contracts
- Hold liability for finances, events or functions.
- Pay for events (some exceptions may occur if the CUBAA or a University representative is participating, and there is a mission-related purpose for the event).
- Run event registration payments through the CUBAA.
- Run fundraising events through the University. All fundraising must be done on the local level.