

UWM ALUMNI ASSOCIATION

PANTHER CAA/RC HANDBOOK

This handbook provides the goals and guidelines for the establishment of and programming for the UWM Alumni Association's (UWMAA) constituent alumni associations (CAA) and for regional chapters (RC).

I. INTRODUCTION and GENERAL INFORMATION

The UWMAA has established CAAs and RCs that operate as sub-committees of the UWMAA Board of Trustees. These CAA/RCs help alumni maintain closer contact with the University.

To help the CAA/RCs operate as efficiently and effectively as possible, the Alumni Relations Department offers the following suggestions, guidelines and responsibilities. If you have any questions or comments, please feel free to contact CAA/RC Coordinator John Bartel at any time. John can be reached at 414-906-4665 or via e-mail at jwbartel@uwm.edu.

We want your CAA/RC to be successful. We also need regular communication with you. That's why minimum standards are set for each CAA/RC:

II. GENERAL RESPONSIBILITIES and SUGGESTIONS

1. The CAA/RC should offer its members a balanced mix of professional development programs, networking or social events, and activities specific to the school or college and its students. These activities should serve the CAA/RC's alumni, serve the University, and, if you are the leader of a CAA, and if you are affiliated with a specific college/school/department, with the Dean's alumni relations goals.
2. CAA leaders should meet with your college/school/department's Dean at least once a year.
3. Each CAA/RC must draft, approve and operate under by-laws that are consistent with the UWMAA By-laws. A template for CAA/RC by-laws is available from the Alumni Relations Department. By-laws are to be drafted within six months of initially starting a CAA or RC, and approved by its own respective CAA/RC board.
4. To give CAA/RC board members a sense of engagement and ownership in the CAA/RC, it is strongly suggested that each board member be given a specific task to help administer the CAA/RC – planning an event, producing a newsletter, calling other board members prior to each meeting, serving as liaison to the Dean's office, maintaining a Web site, and the like.
5. To be considered active, the CAA/RC board must hold no fewer than two meetings each year. To assure better attendance at board meetings, it is strongly suggested that CAA/RC boards set specific meeting dates for the full year. Announcing, and adhering to, exact starting and ending times for board meetings will help with attendance as board

members can plan to commit to a specific amount of time. Submit to the Alumni Office the time, date and place of meetings.

6. To keep CAA/RC members informed of UWMAA activities and initiatives, a short report from the CAA/RC Coordinator should be on the agenda for each CAA/RC board meeting.
7. Because of accessibility issues, events may no longer be held at Alumni House. Meetings may be held at the Alumni House in Milwaukee during normal working hours (weekdays 8 a.m. – 5:00 p.m.) The Hefter Conference Center at 3271 N. Lake Drive in Milwaukee may be available for a fee or CAAs/RCs may choose to find a convenient location on or off campus. Room E220 on the second floor of the UWM Union is very nice for a group of 10-12. The Alumni House and Union bookings should be coordinated through the Alumni Relations staff.
8. CAA/RC Web sites should be linked to the UWMAA Web site (www.alumni.uwm.edu). Put your CAA/RC board meeting minutes on your site, and as much information as possible about your CAA/RC events, award and scholarship criteria and deadlines, etc.
9. Hold at least two meetings/activities each year.

III. RESPONSIBILITIES/SUGGESTIONS FOR THE CAA/RC BOARD PRESIDENT

1. Maintain contact with the Office of Alumni Relations (and if you are a CAA president, with your respective Dean), coordinating events with his or her schedule, getting his or her input on all programs and mailings, and assuring all CAA activities correspond with the Dean's alumni relations goals.
2. Serve as a voting member on the UWMAA Board of Trustees and attend all UWMAA Board meetings and other appropriate events.
3. Attend all meetings of the UWMAA's CAA/RC Committee consisting of all CAA/RC presidents and chaired by a Board of Trustees member. Should a president be unavailable to attend a CAA/RC Committee or UWMAA Board meeting, his or her designee (a member of that CAA/RC's board) may attend and conduct business in the president's place. The designee will have voting rights.
4. Prepare the CAA/RC annual report, including a detailed budget and planning schedule for the next year, and submit it to the CAA/RC Coordinator.
5. Cultivate and recruit CAA/RC board members. This may be done informally or with a nominating committee.
6. Set CAA/RC board meeting dates for the entire year. Schedule and prepare the agenda and other materials for all CAA/RC board meetings. Arrange for minutes to be taken and distributed. The Alumni Office must receive a copy of these board meetings within one month after each meeting is held.
7. Ask people attending your events to sign in or at least provide their business cards. Then within two weeks of these events, provide the UWMAA with the names and contact information (especially e-mail addresses) of those attending your CAA/RC functions so we can keep our database updated.

IV. CAA FINANCES

1. The UWMAA gives each CAA/RC an annual allocation of \$1,000. (See the attached budget worksheet.)
2. The annual allocation is made *only* after the CAA/RC has submitted a detailed and thorough Annual Report/Operational Plan for the following year.
3. The Alumni Relations staff administers each CAA/RC's financial account. All revenues and expenditures must be reported or turned in to the Alumni Relations staff within one month of an event for processing. All disbursements must be requested in writing (or e-mail) so there is authorization on file.
4. **All checks written by alums to the CAA/RC (for an event RSVP, etc.) must be made out to the UWM Alumni Association, *not* the individual CAA/RC or the school/college.**
5. **All reimbursable expenses must be submitted within the same fiscal year (and within 90 days if possible) (attach form). We *cannot* reimburse expenses from the previous fiscal year.**
6. **Our auditors require that we reimburse from an *original* receipt, invoice or credit card slip. Please tape or staple the receipt to a larger piece of paper with your name, home address, date, and purpose of the expenditure clearly printed on it.** (To begin the disbursement process, fill out a check request form, available from the Alumni Relations office, and attach an original receipt or documentation. The "staff approval" on the form refers to approval from an Alumni Relations staff member.)
7. Updated financial reports are available from the Alumni Relations staff. They are mailed (or e-mailed) to each CAA/RC president shortly after the first of each month, if there has been financial activity within the previous month.
8. The UWMAA, and therefore the CAA/RCs, operate on a standard July 1 – June 30 fiscal year, so CAA/RC budgeting and program planning should be done by April.
9. The financial viability of the CAA/RC is the responsibility of the CAA/RC board. Expenditures should be planned well in advance and closely monitored. Planning and budgeting should be as specific and accurate as possible. There is no "slush fund" if an event or program goes over budget.
10. As would be expected, CAA/RC allocations cannot be used for any personal gain, strictly social events, expensive gifts, excessive board meeting refreshments, year-end celebrations, or similar inappropriate activities that do not advance the mission and goals of the UWMAA.
11. If any monies are being transferred from the School or College to a CAA/RC, please be careful to have the check made out to the UWM Alumni Association, and not the UWM Foundation. We cannot transfer money between the Foundation and the UWMAA.

V. HOW DO YOU START A NEW CAA/RC?

To start an alumni CAA/RC, we recommend the following steps:

- The UWMAA will work with you to determine if there are enough alumni in your area to create a viable chapter environment. You need at least 10 UWM alumni interested in forming a CAA/RC. If there are fewer than 10 in your area, you can be listed as a contact for that area in the event other UWM alumni wish to gather for a social event.

Gauging interest

1. Once 10 or more interested alumni are identified, the next step is to gauge the types of interests of those alumni. Some successful approaches to gauging interest include:
 - Create and send out a letter with a survey. Returned surveys usually are sent back by those who have an interest.
 - Hold a UWM gathering. Keep it low-key and informal. This could include a happy hour, dinner or watch a UWM basketball game at a local sports bar or at your home.
2. Based on survey responses or interest at the gathering, form a steering committee consisting of four to eight people. This group will meet to discuss the possible future of a UWMAA CAA/RC. If the committee decides to proceed with an alumni chapter, it should decide on the type of kickoff event to hold as its first official function. UWMAA staff can assist you in the development of this program.

Take time to plan a quality event that will reflect well on you, UWM and the UWMAA. This event will set the tone for the support and participation area alumni will give your CAA/RC. The activity should appeal to a range of age groups; examples include:

- Dinner at a restaurant or family-friendly bar
- Picnic
- Family activity (bowling, minor or major league sporting event, etc.)
- Cookout at a volunteer's home

It also is recommended that the steering committee create an agenda for the first activity. The agenda should include:

- Welcome by event planner and introduction of attendees (if possible)
- Suggest everyone wear nametags (the UWMAA will provide these if given advance notice)
- Thank you to meeting organizers
- Meal, if planned
- Following meal, state reasons for gathering
- Discuss possible ideas for future gatherings; ask for suggestions and interests
- If there's enough interest, elect officers who will coordinate the planning of activities
- Repeat thank you and adjourn the meeting

VI. CAA/RC ACTIVITIES: ENGAGEMENT, SERVICE, FUN!

What type of program or event would your CAA/RC like to hold? The number and types of programming can be as diverse as the chapters themselves. There are a variety of ways to get your CAA/RC involved in UWMAA and UWM activities, and we recommend that they center on

one of three areas – social, service and community. Whatever activity you plan, make sure it's fun for the alumni who will participate.

We encourage you to submit your programming ideas to CAA/RC Coordinator John Bartel so we can compile this list of ideas and share them with other chapters.

Following is a list of ideas that you may consider when planning for your group's activities. And we encourage you to piggyback on existing events, especially as they relate to UWM, wherever and whenever possible.

Existing UWMAA-related events

- **Commencement** – We welcome alumni to help hand out programs and graduating students' gifts at the December and May commencement ceremonies in Milwaukee.
- **Founder's Day** – This new event will be held Sept. 25 every year to commemorate UWM's incorporation as a university.
- **Golf outings** – Consider getting a team comprised of your CAA/RC members to participate in either the UWM men's and women's basketball teams annual golf outings.
- **Open house** – Help staff a table at UWM's annual Open House, held on the campus the last weekend in October.
- **Panther Prowl** – This certified 5K run/walk that starts and ends on the UWM campus is held the third Sunday of every year. Get a group from your CAA/RC to volunteer their time or to form a team that will run or walk in the Prowl.
- **State Fair** – Volunteers are always needed to staff UWM's booth. It's a great way to meet fellow alumni and spread the good news about UWM.
- **Trips** – The UWMAA offers a variety of travel opportunities. Perhaps members of your group/chapter would want to travel together.
- **Wilderness Resort** – The UWMAA offers two outings at this Wisconsin Dells resort with reduced prices for UWM alumni. This event can help attract younger alumni and their families.

Service activities

Staging social activities is fun, but there are a number of other activities you can achieve on campus and in the community, and they can be just as much fun. Here are just a few suggestions:

- **Mentoring** – You have the experience and knowledge that current students need. The UWMAA is developing a mentoring program that will team up Economics students with UWM alumni grads with Economics degrees. Considering becoming part of this effort.
- **Moving day** – Consider helping students move into Sandburg Hall in September.
- **Networking** – Host a networking luncheon or social hour.
- **Panther Advocates** – This is especially important for alumni living in Wisconsin, but it also pertains to alumni living elsewhere. It is a grassroots advocacy coalition of UWM alumni who are concerned with the future of higher education at UWM. We are committed to educating elected officials and our community about the importance of UWM to the state of Wisconsin. Learn more about becoming part of this important organization by visiting <http://www3.uwm.edu/org/alumni/aa/advocates.cfm>
- **Student recruitment** -- Consider helping to promote local students' enrollment at UWM. We can put you in touch with UWM's student recruitment office.

Other activities

- **Alumni Day on Campus** – Hold a special day when alumni from your CAA/RC gather on the UWM campus for a special program or conference.
- **Back to school events** – Host a party for students from your area who are about to return to UWM for another semester.
- **Bus trips**
- **Golf/fishing outings**
- **Lunch with Leaders** --
- **New graduate receptions** – UWM grads can be found in all 50 states. Consider hosting a reception for new UWM graduates that returned to or are moving into your area.
- **Picnics**
- **Monthly meetings**
- **Scholarships** - Help provide scholarships for qualified students from your community.
- **Speakers** – Meet and hear the latest news from UWM coaches and administrators as they travel through your area.
- **Viewing parties** - Support UWM athletic teams with your cheers either at a local sports bar or at someone's home.

VII. WHAT WILL THE UWMAA STAFF DO FOR YOU?

1. **Promote your events/activities** – Chapter activities can be promoted in the UWMAA's monthly e-newsletter and on its Web site. If a CAA/RC wishes to establish a Web site, the UWMAA can host it on its own Web site, although each CAA/RC is responsible for updating its own site information. Each site should list CAA/RC events, contact information and other pertinent information.
1. **Mailings** – Each CAA/RC will receive one free UWMAA-coordinated mailing per fiscal year (July 1-June 30). For CAA/RCs with more than 100 members, this mailing must be sent via bulk-rate mail. All information needed for the free mailing must be submitted to the UWMAA at least eight weeks in advance of the date of the actual activity.
2. **Funding** – As noted earlier, each CAA/RC will receive \$1,000 each year. Financial reports are required of each CAA/RC on an annual basis.
3. **Promotional items** – The UWMAA can provide Panther Packs that consist of (but are not limited to): pompoms, beads (black & gold, of course), UWMAA bookmarks, pens and flyers publicizing upcoming UWMAA trips and activities.
4. **Staff liaison** – John Bartel (jwbartel@uwm.edu, 414-906-4665) will work with each of the CAA/RCs, providing direction, ideas and support.

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