



**VANDERBILT®**

---

Alumni Association

# Chapter Handbook 2020

# Chapter Handbook

## Table of Contents

Welcome and Thank You .....	2
We Are Here to Help.....	3
Chapters 101.....	3-5
Events .....	6-7
Communications.....	8-9
Tools .....	10
You and Vanderbilt .....	11

## Attachments

Attachment A, Role Descriptions .....	12-14
Attachment B, General Event Planning Checklist .....	15-16
Attachment B, Commodore Classroom Event Planning Checklist.....	17-18

## Welcome and Thank You

Dear Leader,

Vanderbilt depends upon our 45 Vanderbilt Chapters and Chapter leaders to be a vital conduit of connection between the university and our global alumni network -- and to inspire Vanderbilt pride worldwide!

We are proud of our active, engaged Chapter leaders and are continually grateful for the time, energy and support you give to the university.

This handbook provides the essential foundational information needed to manage a Vanderbilt Chapter. If you have any questions or concerns about any aspect of chapter management, please contact your Regional Engagement Officer.

We look forward to collaborating and strategizing with you to help further Vanderbilt's mission and priorities through your vibrant Vanderbilt Chapter.

Thank you for all you do for Vanderbilt!

Sincerely,

Lauren Obersteadt

The Mission of Vanderbilt University Alumni Relations

*To encourage alumni in the life of Vanderbilt University and its students, and to encourage lifelong connections among alumni and in support of the university's goals.*

## We Are Here To Help!

Each region has a dedicated member of the Vanderbilt Alumni Relations Office supporting these areas. These Regional Engagement Officers (REOs) are your main connection to Vanderbilt to support all facets of your local chapter.

A few examples of how REOs assist you:

- Guidance on chapter structure, events, area demographics, leadership succession and university initiatives
- Yearly chapter planning and programming implementation
- Help identify and develop volunteers
- Liaison between chapter and university for professor speaking requests
- Securing event spaces, contracts, upfront deposits
- Supplemental financial assistance on a case-by-case event basis
- Promote chapters as an overall global VU network, as well as individual chapter events
- Conduct surveys to gauge alumni interest and assist in future event planning

While this guidebook aims to answer many of your questions, we know other questions will arise. Please contact your REO for additional support.

## Chapters 101

### Purpose

You and Vanderbilt chapters serve an important role in the Vanderbilt ethos. Vanderbilt chapters are a vital gateway for engagement, connecting alumni, parents, students and friends in your local communities, sharing timely information about the university, and encouraging and participating in giving (volunteerism, philanthropy) to the university. Chapters are integrated partners of the university and Vanderbilt Alumni Association and, as such, are not independent 501(c)(3) entities.

### Chapters vs. Regional Cities

Formal Vanderbilt chapters are typically in areas with 400+ alumni\*, with enough alumni interest to sustain a calendar of events (frequency depending on size) and a volunteer Leadership Committee. Regional cities are great areas of Vanderbilt alumni who are typically smaller than 400 alumni and can plan 1-2 events per year with an REO. Sometimes regional cities gain momentum enough to become formal chapters! Resource tools for regional event cities can be found in a separate guidebook.

*\*International chapter alumni population size is smaller.*

### Naming

For new and established chapters, the naming convention is City + Vanderbilt Chapter (e.g., Nashville Vanderbilt Chapter). In instances of international chapters, the naming convention may be Country +

Vanderbilt Chapter (e.g., Japan Vanderbilt Chapter), though the chapter may be based primarily in one area.

### Chapter Demographics

Chapters are organized in one of two ways – chapters, and regional cities. Alumni (undergraduate, graduate) and current parents are included on marketing for all chapter and city events. Students are specifically included in marketing for signature events such as Summer Send-Off Parties. They are welcome to attend other chapter events during academic breaks.

Diversity and inclusion are core values at Vanderbilt. The university is committed to creating an environment where equality is championed, broad diversity is evident and an inclusive experience is hallmark for all who engage. Chapters and regional cities are expected to plan programs that are open and inclusive to all in the Vanderbilt community. Further, chapters and regional cities will seek and welcome volunteers of diverse backgrounds and perspectives.

### Leadership Expectations and Positions

Expectations for an effective Leadership Committee:

- Reflects the diverse population of your chapter area
- Is primarily responsible for the chapter, ensuring it is operational and alumni and friends are engaged
- Strives to include all volunteers interested in serving in a leadership capacity
- Promotes and attends as many chapter events as possible
- Is willing to commit the time necessary to meet chapter needs

Positions listed below represent the variety of volunteer engagement opportunities chapters may have, with structure varying by chapter size and level of activity. In many cases, volunteers may work together as co-chairs. Work with your REO to identify what works for your area. (see Attachment A for role descriptions)

President or Co-Presidents / Vice President\* / Secretary\* / Past President

Athletics / Communications / Community Service / Education / Events / G.O.L.D. / Networking / Social / Social Media

Leadership Committee / Member at Large – variations on this may be used for chapters with undefined volunteer positions

*\*indicates positions typically held only in larger chapter cities.*

### Leadership Terms

Chapter presidents/co-presidents are encouraged to serve a two-year term. Your REO will work with you to help identify and recruit new leadership (ideally from the steering committee or strong volunteer who has assisted with events), as well as assist with planning and onboarding. Outgoing presidents can hopefully transition with the incoming president(s) during the final months of their term and may remain as a past-president(s).

While chapters typically do not have term limits for steering committee volunteers, many serve in their role for two years. After two years, we recommend working with your chapter leaders and REO to

reassess whether or not you would like to continue in your current role, try your hand at another chapter position, or pursue other opportunities around the university.

### *Recruit, Recruit, Recruit*

Get by with a little help from your friends (and network)! Utilize chapter gatherings – and your existing committee – to recruit new volunteers. We recommend:

- Looking at your existing committee – a great volunteer who is looking for the next step could be in your own backyard
- Be on the lookout for engaged alumni at your events (repeat attendees, engaging attendees, attendees who actively ask how to get involved)
- Hold planning meetings that are open to all in the community
- Utilize your personal VU networks
- Send out a survey to the community requesting volunteers

### *Succession Planning*

Future volunteers are vital to the success of your chapter! By working closely with your REO, you will be able to think about next steps and plans for the continued success of the chapter.

## Events

Events are the lifeblood of chapters. They foster connections among your Vanderbilt chapter community and with the broader university. Generally speaking, events should be planned at least two months in advance, allowing for ample logistics and promotion time. Chapter planning meetings are a great way to build a chapter event calendar for the next six months ahead. Your REO will help you with yearly planning, best practices across chapters, budget for each event, promotions, etc.

### *Holding Your First Event*

An inaugural event can take many forms, but a casual gathering with broad appeal is typically recommended. Your REO will work closely with you to help plan and make sure this event is well marketed.

### *Signature Alumni Association Events*

**Summer Send-Off Party:** VU Alumni Association's longest running event tradition (50+ years!) welcoming incoming students to the Vanderbilt community

**Commodore Classrooms:** Bringing the classroom to you! Professors share their latest research and connect chapters back to the pulse of campus and their own student experience

**Networking Night:** Networking annually around the globe all on one night each November

**Commodores in the Community:** Service projects across chapters each March, highlighting our Vanderbilt passion and tradition for service

**Vanderbilt & You:** Annual admitted student programs in cities identified by Office of Undergraduate Admissions

**Welcome Parties:** Welcoming new alumni to cities with large young alumni populations

**Giving Day Happy Hours:** Celebrating Commodore support on Giving Day in largest chapter areas



### Calendar of Signature Events

The events below are held, dependent on the size of your city. Work directly with your REO to determine what works best for your area.

January / February – Chapter Planning Meetings  
March – Commodores in the Community (Service)  
April – Vanderbilt & You (select cities); Giving Day event (select cities)  
July – August – Summer Send-Off Party  
September – Chapter Planning Meetings  
September – October – New Grad Welcome Party (select cities)  
November – Networking Night  
Ongoing: Commodore Classrooms (chapter size dependent, 1-2/year)

### Additional Sample Events for your Chapter Calendar

Consult with your REO for your chapter's historical event data, best practices across chapters, and new ideas for your chapter.

Networking lunch/coffee/breakfasts  
Game Watches / VU sports outings / local sports outings / SEC school events  
Family events  
Cultural events (i.e. wine tastings, museum/gallery tour, cooking class)  
Community Service  
Happy Hours  
Holiday Parties  
Supper Club / Dinner for 8

### Event Checklist

The best events start with collaboration from your chapter leadership team, coordination with your REO and time! It is important to discuss the desired outcome of the event, audience, and budget – among other topics. We kindly request six to eight weeks lead-time on all events, with the exception of Commodore Classrooms. Commodore Classrooms require at least 12 weeks to plan, and have the potential to take longer based on faculty availability.

See Attachment B for two sample event timelines and remember, failing to plan = planning to fail 😊

### Venues, Contracts

Volunteers know their city best, and because of that we look to you to help source venue ideas. Once venues have been identified, your REO can help to navigate the complexities of events – size (including historical attendance), budget, and food/drink/AV needs.

At no point should a volunteer sign a contract on behalf of the university or Alumni Association. Your REO will handle this on behalf of the university and Alumni Association.

*P.S. - Be sure to take event photos and send them to your REO!*



## Communications

### Email

On your behalf, we send emails to promote your upcoming events. The audience for these emails is alumni (graduate, undergraduate) and current parents in your chapter area (using zip code ranges). Students are specifically included for signature events such as Summer Send-Off Parties.

It is important to plan ahead so that we can have ample time to send communication about your event. We like to send our first event email four to six weeks out, with time for a reminder (or, two!).

Be sure to encourage alumni and current parents to:

- Add us to their favorites or safe senders to ensure delivery of emails
- Update their information in VUconnect, or send us an email ([alumni@vanderbilt.edu](mailto:alumni@vanderbilt.edu))
- Reach out to us if they are having trouble receiving emails ([alumni@vanderbilt.edu](mailto:alumni@vanderbilt.edu))

### Social Media

Reach people outside of their inboxes! Be sure to share upcoming events, and photos (during/after) on your chapter social media channels. As a compliment to emails, Alumni Relations will run ads for select events via Facebook and Instagram. Talk with your REO about this possibility.

We encourage chapters to identify (and let your REO know!) a social media point person. Your content will benefit by having a knowledgeable (or willing to learn!) volunteer dedicated to making your posts and other materials the best they can be.

We recommend a Facebook group, and/or Instagram account. At this time, we do not recommend Facebook pages for new chapters, LinkedIn groups, or Twitter handles. If you have an existing page, we recommend you keep that and not transition to a group.

For a full overview, please review our [Social Media Guidelines](#).

Don't forget to connect with us (@vanderbiltalumni), and the university (@vanderbiltu)!

### Event Calendars

All upcoming chapter events can be found at [www.vuconnect.com/events](http://www.vuconnect.com/events) as well as your individual chapter webpage

### Surveys

We use surveys as a way to help connect the dots between the desires of your local community, and you – the planners! They are used in a handful of ways:

Attitudes and Perceptions: your REO will be happy to solicit the local chapter community (alumni, current parents) about your chapter – event types/content, locations, timing, etc. We recommend this particular survey no more than once per two years.

Planning Meeting: on occasion, we utilize surveys to help generate a list of interested participants in a planning meeting. This can be helpful for chapters just starting out, or our more established chapters looking for new volunteers.

Post – Event: for select-events, attendees are surveyed post-event to garner their thoughts and reflections on the event they have attended.

Check with your REO today to see if a survey has been done recently for your chapter!

#### Logos

“A strong Vanderbilt brand relies on consistent use of the Vanderbilt logo...” – Vanderbilt Communications

A variety of logos and guidelines around their usage can be found online at  
<https://www.vanderbilt.edu/communications/brand/logos.php>

Note, “The...“Star V” logo is reserved for Vanderbilt...athletics....” We ask that you refrain from utilizing this logo, or a modified version, in your social media pages.

Logo questions? Contact your REO to discuss.

## Tools

### [Batch Geo](#)

Let us help you visualize where your constituents are located. Your REO can generate a Batch Geo report as a helpful tool for seeing where your alumni and current parents live and work (dependent on the information in our alumni database). One of our favorite ways to utilize Batch Geo is to take advantage of their filters. For example, we can show you where alumni 0-15 years out live in your city. You can also filter by VU school if you wonder, for instance, how many Engineering alumni are in your city.

### [Chapter Dashboard](#)

A few numbers we can provide:

# alumni (all) / # G.O.L.D. alumni / Undergraduate students attending from your area

### [VUconnect](#)

[VUconnect.com](https://vuconnect.com), newly launched in late 2019, is your one-stop shop for all things related to chapters and the Alumni Association. VUconnect is the portal through which alumni can update their mailing information to ensure they receive communication about your chapter area. *Did you catch that? VUconnect is the online and easy way for alumni to update their address so they get details about your chapter events.*

Many chapters have their own individual pages, updated regularly with new photos, events and contacts. In addition to chapter resources, alumni can learn more about:

[career resources](#) / [alumni directory](#) / [update your contact information](#) / [become a career adviser](#) / [Vanderbilt news](#) / [benefits & discounts](#) / [travel program](#) / [shared interest groups](#)...and, more!

### [Event Check-In](#)

Newly launched in 2020, the VUconnect event check-in tool will play a vital role in helping us to collect event participation from around the globe. Contact your REO for more details about how you can deploy this tool for your events.

### [Historical Event Overviews](#)

Just starting out, or want to get an understanding of what happened before ‘your time’? Let us pull an Event Overview for you! We can provide the name, date, and approximate number of participants at your events since 2014.

### [Surveys](#)

See the communication section for an overview on the surveys we can conduct with your chapter area. If surveys have been done recently, your REO can share those details with you!

## You and Vanderbilt



### Code of Conduct

Chapter volunteers represent the Vanderbilt Alumni Association and Vanderbilt University. A chapter volunteer's primary responsibilities are to promote Vanderbilt within their respective city or country and to provide an engagement conduit through meaningful programming wherein members of the local and visiting community can connect.

A local chapter is, by definition, a representation of Vanderbilt to its community. As an ambassador of Vanderbilt, it is important to be mindful of all facets of the chapter including but not limited to events, social media and your chapter leadership team.

### Data Confidentiality

At times, you may be provided with data that is considered confidential, including contact information. This information is intended exclusively for purposes related to Vanderbilt's programs. Use of this information for personal, political or commercial purposes is prohibited. Furthermore, the information you receive may not be reproduced, retransmitted, distributed, or published.

### Removal

Failure to uphold our data confidentiality or code of conduct policies may result in removal from your position. When agreeing to serve in a chapter volunteer role, you confirm that you will uphold these tenets.

## Attachment A – Role Descriptions

Below are brief descriptions of key roles that chapters may have as needed. Consult with your REO to determine best structure for your chapter.

### President / Co-President

The role of the President is to oversee all chapter operations, preside over local chapter activities/events, and ensure the chapter is running smoothly and efficiently. He/she is also the “ambassador” to local alumni, parents, friends, and the community and must be an alumnus/a of Vanderbilt. Chapters may appoint co-presidents.

Expectations (with assistance from REO):

- Executes the goals and mission of the overall Vanderbilt chapter program and evaluates chapter progress annually
- Understands and represents the interests
- Presides at chapter functions and oversees the Leadership Committee
- Organizes and leads Leadership Committee and/or planning meetings
- Facilitates the planning of the chapter’s six-month calendar

### Athletics Chair

The Athletics Chair is responsible for planning events with an athletic focus. The chair should monitor Vanderbilt athletic schedules, paying attention to events that are televised in the chapter area or taking place in or near the chapter city.

Expectations:

- Plans Vanderbilt game watches (connect with REO regarding venues)
- Plans outings to local Vanderbilt athletic events
- Plans outings to local professional athletic events

### Education Chair

The role of the Education Chair is to work with your REO and the Leadership Committee to plan a Vanderbilt Commodore Classroom (faculty lecture event) that appeals to alumni with diverse interests.

Expectations:

- Identifies topics of interest with the Leadership Committee. Possible ideas might include:
- Current events in your chapter area or overall (i.e. elections)
- Historical landmarks
- Art exhibits
- Works with REO to identify Vanderbilt professor to speak on chosen topics
- Works with REO to identify appropriate venue and catering needs
- Be the on-site host for the event, guest speaker and attendees

## Attachment A – Role Descriptions, cont’d.

### Social and/or Cultural Chair

The Social/Cultural Chair is responsible for planning events such as happy hours, holiday parties, cooking classes, museum tours, and wine tastings in coordination with Leadership Committee and your REO. Sample events include theatre, ballet, symphony, concert in the park, and museum exhibits.

#### Expectations:

- Looks for local events the chapter can attend
- Plans diverse events that appeal to a wide variety of alumni
- Researches venues for food and beverage specials to entice participation

### Community Service Chair

The Community Service Chair plans opportunities for Vanderbilt alumni to give back to their communities in the name of Vanderbilt.

#### Expectations:

- Participates in a service project (Habitat for Humanity, Special Olympics, highway/park clean up, soup kitchen)
- Organizes annual Commodores in the Community (any service project in March)
- Organizes a toy drive, canned food drive or book drive tied into a chapter event

### Networking Chair

The Networking Chair plans event opportunities for alumni to network with one another. Many chapters have established networking series (monthly, quarterly); your REO and chapter leaders can guide you with best practices for what works best for your chapter.

#### Expectations:

- Plans annual Vanderbilt University Networking Night with REO
- Plans small group chapter networking breakfasts, lunches or other networking opportunities (usually quarterly or monthly/bi-monthly for larger chapters)

### Graduates Of the Last Decade (G.O.L.D.) Chair

The G.O.L.D. Chair plans activities that engage younger alumni (0-10 years out) and provide opportunities for them to become future active volunteers for the chapter and the university.

#### Expectations:

- Plans events geared toward the recent graduates, i.e. happy hours, and networking events
- (For chapters with largest young alumni populations) Plans a Welcome Party event to welcome newest alumni to the chapter

## Attachment A – Role Descriptions, cont'd.

### Communications / Social Media Chair

The Communications / Social Media Chair has the very important task of marketing the chapter's events via social media to boost participation. This position works closely with other Leadership Committee positions, especially events chairs.

#### Expectations:

- Posts event information on chapter social media pages linking to the chapter website or chapter event registration pages, shares information about university alumni and Alumni Association initiatives (i.e. Giving Day)
- Posts event photos to chapter social media pages and emails copies to REO

### Family Events Chair(s)

The role of Family Events Chair(s) is to find or plan events, which appeal and engage to the families in the Atlanta area. Event ideas include zoo outings, events at local parks, concerts, and seasonal outings (pumpkin picking, trail hiking, etc.).

#### Expectations:

- Plans events that appeal to Vanderbilt alumni families
- Works with other chairs (Educational/Cultural, Athletics, Social) to have families involved in events, where appropriate
- Research local community events and gatherings that would appeal to Vanderbilt families

### Immediate Past President

The immediate past president is a valuable resource for the current chapter leaders. The role of the immediate past president is to ensure consistency and serve as an advisor to the Leadership Committee.

#### Expectations:

- Assists president as a resource for chapter operations, understanding the current president will operate the chapter in his/her personal manner
- Provides assistance, guidance, insight and suggestions to president as necessary
- Attends leadership committee meetings and provides a recent history of chapter as necessary
- Works with leadership committee to encourage event attendance as needed
- Helps leadership committee identify and recruit potential volunteers from VU community
- Participates in chapter and VU events

### Members-at-Large

A Member-at-Large is responsible for planning events such as happy hours, holiday parties, trivia, wine tastings, etc. They may also work with other chairs to plan and execute events.

#### Expectations:

- Plans diverse events that appeal to a wide variety of alumni
- Researches venues for food and beverage specials to entice participation

## Attachment B – General Event Planning Checklist

(For Commodore Classrooms, see separate Checklist)

<b><u>Date</u></b>	<b><u>Action</u></b>
10 – 12 weeks before event	Chapter Leaders and REO (VU Regional Engagement Officer) communicate about event idea.
8 weeks before event	Chapter Leaders and REO work together to identify, plan, and book venue and catering if relevant (REO signs contracts).
6 - 8 weeks before event	REO creates registration link and provides to Chapter President for review.  REO sends email proofs to Alumni Relations team, Chapter President for review.
4 - 5 weeks before event	Initial email sent by REO.
2 - 3 weeks before event	Second email sent by REO.
1 - 2 weeks before event	Third email sent by REO.  Chapter Leaders post on social media about event and drum up additional interest with personal emails or calls to chapter participants.  As needed, REO can work with Communications to produce social media ads.
1 week before event	Additional email reminder sent by REO if registration boost is needed.
1 day before event	If needed, Chapter Leaders or REO send a reminder email for registrants.



## Attachment B – General Event Planning Checklist, cont’d

Day of event	If staff traveling, REO arrives at venue to confirm proper setup and make any final adjustments.
At event	Chapter Leaders (and specifically Chapter Point of Contact person for that event) welcome guests, take photos.
Within 1 week after event	Chapter Leaders / appointed Chapter Social Media Chair post photos on chapter social media. Also send photos to REO for chapter webpage, etc.  Email follow-up to attendees with photos (if available) from event thanking them for attending.

## Attachment B – Commodore Classroom Event Planning Checklist

### **Date**

12 – 14 weeks before event

10 – 12 weeks before event

8 - 10 weeks before event

6 - 8 weeks before event

4 - 5 weeks before event

2 - 3 weeks before event

1 - 2 weeks before event

### **Action**

Chapter Leaders provide Liaison (REO) with a topic about which or professor in whom they are interested.

REO communicates with appropriate dean and professor about availability to travel and professor to chapter.

Chapter Leaders and REO work together to identify, plan, and book venue and catering (REO signs contracts).

REO creates registration link and provides to Chapter President for review.

REO sends email proofs to team, Chapter President, and professor for review.

Initial email sent by REO.

Second email sent by REO.

Third email sent by REO.

Chapter Leaders post on social media about event and drum up additional interest with personal emails or calls to chapter participants.

As needed, REO can work with Communications to produce social media ads.

## Attachment B – Commodore Classroom Event Planning Checklist, cont'd

1 week before event	<p>Additional email reminder sent by REO if registration boost is needed.</p> <p>REO sends briefing documents to professor and Chapter Leader(s) attending, including talking points for introducing speaker and discussing upcoming chapter events.</p>
1 day before event	<p>If needed, Chapter Leaders or REO send a reminder email for registrants.</p>
Day of event	<p>REO arrives at venue to confirm proper setup and make any final adjustments.</p>
At event	<p>Chapter Leaders welcome guests, take photos, and introduce professor.</p> <p>REO will also welcome guests and manage event flow/logistics.</p>
Within 1 week after event	<p>Chapter Leaders / appointed Chapter Social Media Chair post photos on chapter social media. Also send photos to REO for chapter webpage, etc.</p> <p>Email follow-up to attendees with photos (if available) from event thanking them for attending. If needed, a survey about event can be included to collect data and feedback. This email can be sent by Chapter President or REO.</p>