

ALUMNI  
ASSOCIATION OF  
LINCOLN  
UNIVERSITY

2018 GUIDE TO  
ESTABLISHING  
AN AALU  
CHAPTER

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(Information revised from a 1998 manual developed by the Admissions & Alumni Relations Offices)	

## **AALU MISSION/GOALS**

The mission of the Alumni Association of Lincoln University, Inc. is to cooperate with trustees and faculty in advancing all interests of education generally by increasing the number of students in all departments of instruction, and to strengthen and perpetuate the ties which bind the Alumni to each other and to their Alma Mater.

The goals of the Alumni Association of Lincoln University, Inc. are to:

- (1) Be recognized as a unified Alumni body as we endeavor to develop Alumni leadership;
- (2) Raise funds for our Alma Mater;
- (3) Recruit qualified students; and
- (4) Encourage Alumni to increase individual financial support and to give regularly.

## **HOW TO START AN ALUMNI CHAPTER**

### **Forming Chapters**

Local Chapters of the General Alumni Association shall be formed by authorization of the Executive Committee on the application of five (5) or more members residing in contiguous territory subject to the following conditions:

- i) The number of Chapters established in any given locality shall be determined by the Council;
- ii) After approval by the Executive Committee of the application for establishing a local Chapter of the Alumni Association, a Charter signed by the president, secretary, and treasurer shall be issued upon payment of a fee established by the Council;
- iii) A Chapter failing to hold at least two meetings during a calendar year may be asked to surrender its Charter, if such action is voted by the Council.

### **Purpose of Alumni Chapters**

The Purpose of Alumni Chapters are:

- 1) To cultivate and foster a close fellowship among the graduates and former students of the University living in the Chapter vicinity (geographical boundary);
- 2) To promote the best interest of the University.
- 3) To support and advance the cause of higher education.
- 4) To encourage and support a close relationship with the Alumni Association of Lincoln University.
- 5) To encourage and support financially the Alumni Association, the local chapter, and the University.
- 6) To promote togetherness and unity amongst Alumni.

## **Process for Developing an Alumni Chapter**

### **To Create an Alumni Chapter, you will need to:**

- 1) Identify the Initial Leadership
- 2) Define Geographical Boundaries or Professional Affiliation;
- 3) Develop Chapter Membership Guidelines;
- 4) Develop Chapter Constitution
- 5) Hold an Initial Meeting; and
- 6) Conduct a General Organizational Meeting.

### **Identify Initial Leadership**

All chapters must identify at least four officers - President, Vice President, Treasurer, and a Recording Secretary to begin functioning.

### **Establishing Geographical Boundaries or Professional Affiliations**

Area Alumni should agree on a specific geographical region for their Chapter. Alumni residence within specific zip coded or adjacent county lines provides convenient boundaries. Alumni seeking to unite and form a Chapter based on common career paths, e.g., educators, military, social scientists, health professionals, etc. are also encouraged to do so upon meeting the requirements contained herein.

### **Establishing Chapter Membership Guidelines**

#### **There Shall be Two Classes of Membership Offered by Chapters:**

#### **A. Regular Membership**

1. Regular financial: those members who are financial for the current calendar year and who have graduated and hold degrees from the University or, who have completed at least one (1) full year's work at the University and left in good standing or not completed such work and upon the sponsorship of three (3) members of the Association have been approved for membership in the Association by majority vote of two thirds of the members present at the regular stated meeting.

2. Regular non-financial members: those who qualify for any provision stated above but who are not financial for the current calendar year.

#### **B. Honorary Membership**

1. Those who have received honorary degrees from the University not having attended its courses.

- All classes of regular financial members shall be entitled to the rights and privileges of the Chapter and subject to duties and abilities of full membership, except that only regular financial members shall be eligible to vote and hold office in the Chapter.
- Financial honorary members shall be eligible to vote but cannot hold any office in the Chapter.

2. Those individuals who have connected in some way and seek to affiliate themselves with and/or support the University. This may include spouses or domestic partners, parents, children, friends, etc., or others who have a vested interest in supporting our historic University and Alumni.

## **Developing A Chapter Constitution**

All Chapters shall be committed to the purpose and spirit of the AALU, Inc. and shall cooperate with its program. Chapters are expected to adopt rules and regulations consistent with the Constitution of the AALU.

Each Alumni Chapter Constitution should include the following sections:

1. Name of Organization - Refer to attached Chapter Constitution sample
2. Purpose of the Organization - Uniform statement for all Chapter Constitutions
3. Chapter Membership
4. Officers of the Organization
5. Nomination and Election of Officers
6. Meetings
7. Committees
8. Dues
9. Amendments to the Constitution
10. Dissolution of the Chapter

## **OFFICERS**

Once a Chapter is fully established after a one-year probationary period, the Officers of the Chapter shall be President, First and Second Vice-Presidents, Secretary, Treasurer, Chaplain, Parliamentarian and Historian.

### **President**

It shall be the duty of the President to preside at all meetings, to appoint all committees and chairpersons of committees and to call special meetings at his/her judgement may direct. The President shall be charged with the responsibility of seeing that all business of the Chapter is conducted in strict conformity with the local and National Constitutions. The President shall be ex-officio of all committees, with the exception of the Nominating and Auditing Committees. The President shall co-sign all contracts and checks pertaining to the Chapter.

### **Vice President(s)**

Vice Presidents shall cooperate with the President, shall be directly responsible to the President and shall assume the duties of the President in his/her absence or incapacity.

1. The first Vice-President shall serve as chairperson of the Executive Committee.

2. The second Vice-President shall serve as chairperson of the Program Committee.

**Secretary**

The Secretary shall direct to various members of the Chapter all notices of meetings and direct letters (electronic and/or postal) to all persons as such letters pertain to the official business of the Chapter. The Secretary shall record the proceedings of all meetings and record all monies received and disbursed. The Secretary shall co-sign all contracts pertaining to the Chapter.

**Treasurer**

The Treasurer shall be the custodian of all funds of the Chapter for which he/she shall be bonded at the cost of the Chapter. The Treasurer shall deposit all such finds into a financial institution approved by the Chapter and/or Association, or, the Executive Committee in the name of the Chapter Name of the Alumni Association of Lincoln University, Inc. The Treasurer shall prepare written monthly reports of all monies over which he/she has custody. The Treasurer shall present the books for auditing to the Auditing Committee by January 15th of each calendar year. The Treasurer shall disburse finds as qualified and directed by the Chapter. The Treasurer shall co-sign all checks pertaining to the Chapter. The Treasurer will maintain a Chapter list which establishes the financial status of all members of the Chapter. The Treasurer shall be a member of the Finance Committee.

**Chaplain**

The Chaplain shall promote and develop the spiritual life of the Chapter.

**Parliamentarian**

The Parliamentarian shall be responsible for the interpretation of Roberts Rules of Order, Newly Revised, and the Constitution of the Chapter. The Parliamentarian shall ensure the Chapter Constitution is not in conflict with the Constitution and By-Laws of the Alumni Association of Lincoln University. The Parliamentarian shall render decisions in all areas of disagreement involving the Roberts Rules of Order and the Constitution of the Alumni Association.

**Historian**

The Historian shall be responsible for compiling and keeping a permanent record of the activities of the Chapter and shall publish the same from time to time.

## **Chapter Representative to the Alumni Association of Lincoln University**

The Chapter Representative shall attend all General Alumni Association meetings and report back to the chapter. The Chapter Representative represents the interest of the Chapter and is empowered to vote on behalf of the Chapter at national meetings on issues affecting the operation of the AALU. The Chapter Representative is appointed by the President.

## **NOMINATION AND ELECTION OF OFFICERS**

- The Officers shall be elected at the regularly scheduled meeting to be held in the month of January and shall be installed immediately.
- The election of officers of the Chapter shall be held by ballot every two (2) years. Officers shall be elected for a period of two (2) years and are eligible for re-election except that the President shall serve only two (2) successive terms.
- A list of the candidates shall be prepared and presented to the members at the December meeting by the Nominating Committee Chairperson. Nominations from the floor may also be accepted at the January and December meetings. Prior to the regularly scheduled meeting in January a list of candidates nominated for each office shall be prepared and sent out to all members.
- All such elections shall be conducted by the Chairperson of the Nominating Committee who will be appointed by the Membership. All elections shall be by secret ballot.

## **MEETINGS**

- The presence of eight (8) members shall constitute a quorum at the regularly scheduled monthly meetings for the transaction of business of the Chapter. Such meetings shall be presided over by the President or the highest ranking elected officer in the absence of the President.
- All financial matters shall be discussed at the regularly scheduled monthly meetings of the Chapter.
- The regular monthly meeting of the Association shall be held every Day/Date of Month during the calendar year. The regularly scheduled monthly meeting for November and December will be held on the third (3rd) Day/Date of Month (suggested because of holiday season). Meetings may be cancelled and/or rescheduled by the President due to emergency situations. The time and location of the rescheduled meeting shall be designated by the President.

## **COMMITTEES**

The Standing Committees of the Chapter shall be the Executive, Program, Athletic, Finance, Public Relations, Scholarship, Membership and Sunshine (Hospitality).

- The Executive Committee, chaired by the First Vice-President, shall consist of all elected officers and committee chairpersons. The Executive Committee shall meet prior to the regularly scheduled monthly meeting of the Chapter.
- The Program Committee, chaired by the Second Vice-President, shall be responsible for planning the programs of the Chapter. All committee chairpersons shall be members of the Program Committee.
- The Athletic Committee shall be responsible for helping to foster and improve member support of the University's athletic programs.
- The Finance Committee shall be responsible for overseeing the financial operations of the Chapter and to prepare an annual budget, subject to approval by the Chapter.
- The Public Relations Committee shall be responsible for promoting events and activities sponsored by the Chapter.
- The Scholarship Committee shall be responsible for reviewing scholarship applications and making recommendations to the Association for approval. The Scholarship committee shall also be responsible for conducting activities which generate revenue for the scholarship fund.
- The Membership Committee shall be responsible for recruiting new members, retaining current members and reclaiming inactive members for the Association.
- The Sunshine (hospitality) Committee shall be responsible for expressing sympathy, well-wishes, congratulations, etc. via cards, flowers, etc. to Alumni. The Sunshine Committee will also be responsible for the hospitality of the Association. The local chapter is responsible to inform the AALU of any expressions from this committee (births, deaths, marriage, illness, promotions, etc.) The Special Committees of the organization shall be the Auditing Committee and the Nominating Committee.
- The Auditing Committee shall be responsible for auditing the financial records and books of account of the Association. The results of the audit shall be reported at the February meeting. Members of the Auditing Committee shall not consist of current officers. The chairperson of the Auditing Committee shall be appointed by the President.
- The Nominating Committee shall prepare a slate of candidates for each office. The Nominating Committee shall also distribute the ballots, collect the ballots, count the ballots and announce the results of the election.
- All committee chairpersons shall be charged with submitting an annual budget for their committee to the Finance Committee.

## **DUES**

It is required that the Chapter Officers establish dues for its members. Chapter Officers may collect these local dues will help fund Chapter programs, events, and scholarships. The local dues will be set by the Chapter. It is recommended that Chapters draft an operating budget to help set dues based on their vision for the Chapter.

The annual dues of the National Association (\$35), shall be set each year by the Association at the last regular meeting (Homecoming) of the calendar year. The former practice of keeping \$10 of the National Association dues towards your Chapter treasury has been terminated.

Chapter members may pay their dues in two ways. (1), Chapter members may pay their National Association dues electronically by going to the official webpage of the National Association at:

**<http://www.aalupa.org>**

Select the "Membership" header and follow the prompts under "Join or Renew Membership". (2), Chapter members may also mail their dues directly to the Post Office Box of the National Association. Chapters, if in receipt of dues intended for the National Association shall also (forward) submit these payments within 14 days to the same at:

**Alumni Association of Lincoln University  
Attention: Association Treasurer  
P. O. Box 8522  
Silver Spring, Maryland 20907**

Any Association dues received by the Chapter, shall be forwarded to the Post Office Box of the National Association within 14 days of receipt. A Chapter's delay in forwarding a member's National dues payments could result in that member losing their ability to vote in an AALU National election.

### **Amendments to the Chapter Constitution**

The Constitution may only be accepted when approved and ratified by the Executive Committee of the Association. At the Chapter level, the Constitution may be amended by a majority of Chapter members present at any regularly scheduled monthly meeting provided there is a quorum after the membership has been duly notified of the proposed amendment in writing and further provided that the amendment(s) has/have been read at one preceding meeting.

### **Dissolution of the Chapter**

In the event of the dissolution of the Chapter Name Alumni Association of Lincoln University, assets will become the property of the General Alumni Association, to be used for the support and aid of needy students at Lincoln University.

### **INITIAL MEETING**

During the initial meeting, one of the principal Alumni contacts (generally there are two or three in an area) should assume the responsibility as interim President and establish dates for general meetings. The initial meeting should establish a Mission Statement as to the "how" and "why" of an Alumni Chapter in the given area. The General Alumni Association Officials will assist in this process. A final draft of the governing by-laws for the Chapter should be written and agreed upon. The by-laws should include the name of the Chapter, its purpose, definition of its membership and

procedures for electing officers and a board of directors. In addition, the by-laws should stipulate frequency of general elections and meetings. At the conclusion of the initial meeting, a date should be set for the general organizational meeting. Announcements, mailings, and Alumni contacts concerning the general meeting should be developed in conjunction with the Alumni Association.

## **GENERAL MEETING**

All Alumni in the area should be invited to this meeting. In addition, the President of the Alumni Association or his/her designee should be invited to attend. The University should be invited by the AALU President or his/her designee. The agenda of the General Meeting should be as follows:

1. Opening informal reception (Meet & Greet)
2. Greetings from the Chapter (Interim President)
3. Remarks from the President (General Alumni Association)
4. Remarks from the President (University or Representative)
5. The Chapter's mission statement
6. Review and adoption of the by-laws
7. Action Plan developed and adopted

*The Plan of Action should include the following:*

- a. Operational Budget
- b. Program
- c. Membership Services
- d. Relationship to the General Alumni Association
- e. Establishment of Standing Committees - standing committees should include, but not limited to Executive, Program, Athletic, Finance, Public Relations, Scholarship, Membership, and Hospitality.
8. Awarding of Chapter Charter by the General Alumni Association President

## **MAINTAINING AN EFFECTIVE ALUMNI CHAPTER**

To maintain an effective Alumni Chapter, all Alumni Chapters must:

1. Develop and maintain a constitution, by-laws, rules of order, policies and Procedures.
2. Sustain a Chapter membership of at least 5 members to remain active.
3. Ensure the Chapter Treasurer is bonded (maintains theft liability insurance).
4. Submit programs for review and approval by the Association Executive Committee.
5. Submit annual reports to the Alumni Association.
6. Submit quarterly and annual summary financial reports to the Association.
7. Submit a list of officers yearly to the Association.
8. Submit a list of finalized Chapter programs yearly to the Association.
9. Host at least one major fundraiser each year to benefit the Student Scholarship Fund.
10. Host one major program for Student Recruitment or participate in at least one College Fair each year.
11. Host one public relations event each year.
12. Conduct at least two meetings during a calendar year.
13. Establish and maintain a dues structure and review yearly.

## **FUNDRAISING**

Chapters are encouraged to host fundraisers that would enhance their ability to operate and to support financial contributions to Lincoln University and its students.

## **IMPORTANT POINTS:**

1. All direct solicitations of funds for or in the name of the University shall first be approved by the Executive Committee; this shall not apply to entertainment, sports, games or other social affairs to which admission is paid or subscription asked.
2. All direct solicitations of funds for the University or in its name shall have the authorization and approval of the appropriate University officials.
3. Chapters cannot request to become a separate 501 c(3) tax-exempt organizations without permission from the Executive Council of the AALU.
4. Chapters shall not sponsor events for the general public such as boat rides, bus trips and conventions without obtaining hazard and liability insurance.
5. Chapters cannot raise money for one purpose and use it for another.
6. Chapters cannot raise money for Lincoln University or in Lincoln's name and keep the money for other uses.
7. Chapters must not implement programs or financial campaigns that conflict with state and federal non-profit rules and regulations.
8. Chapters must not sponsor events that conflict with the fundraising efforts of the University (e.g., phone solicitations).

9. Chapters must within 14 days of receipt, forward any monies collected that are collected, earmarked for, or donated to the National AALU.

## SAMPLE MEETING AGENDA



Alumni Association of Lincoln University, Pa. Chapter  
P.O. Box # (recommended)  
Any City, USA 00000

### **AGENDA - Date**

Opening Prayer

Minutes of previous meeting

Correspondence

Treasurer's Report

Executive Committee Report

Standing Committee Reports

Programs

Athletic

Finance Committee

Public Relations Committee

Scholarship Committee

Membership Committee

Sunshine Committee

Campus Happenings

Old Business

New Business

Closing Prayer

Alma Mater

## IMPORTANT EVENTS THAT DESERVE CHAPTER REPRESENTATION/PARTICIPATION

1. All Alumni Association Meetings
2. Homecoming - October
3. Founder's Day - April/May
4. Reunion/Commencement Weekend (especially at Alumni Banquet) - May  
\* Chapters may want to present the University with their scholarship contribution for the year at this time.
5. Alumni Picnic - July
6. Alumni Golf Tournament - July
7. ANY and all Special University/Association fundraisers/ Neighboring Chapter Events
8. Alumni Executive Council Meetings
9. Chapter New Student Welcome Events/Picnic (Support from Neighboring Chapters)
10. CIAA Basketball Tournament

# **SAMPLE CHAPTER OFFICER SUBMISSION FORM**

## **A SUGGESTED (SAMPLE) EVENT PROGRAM FOR ALUMNI CHAPTERS**

### **SEPTEMBER**

Installation of Officers; outline of program for the year; payment of dues—local and GAA; discuss participation/attendance at homecoming festivities; social hour.

### **OCTOBER**

Panel or group discussion on some phase of the University (athletics, scholarships, policies, etc.) or a speaker from the University; representation at Homecoming festivities.

### **NOVEMBER**

Entertainment of wives and sweetheart, husbands and boyfriends.

### **DECEMBER**

Preparations for Lincoln Day Dinner; quarterly report on activities and finances.

### **JANUARY**

Progress report on Lincoln Day dinner; social hour.

### **FEBRUARY**

Lincoln Day Dinner

### **MARCH**

Final report on Lincoln Day Dinner; plans for entertainment of high school graduates (prospective Lincoln students); quarterly report.

### **APRIL**

Discussion of representation at Commencement/Founder's Day activities; Entertainment of high school seniors.

### **MAY**

Election of officers; suggestions for next year's program; quarterly report. Discuss representation/participation at annual Alumni picnic/Alumni golf tournament

### **JUNE**

Card party, garden party, picnic, or dance.  
Election of Officers; suggestions for next year's program

### **JULY-AUGUST**

Summer Period. Attendance at National Alumni Convention and Caucus and Picnic. New Student Welcome Events, New Student Move-In Day

**GENERAL ALUMNI ASSOCIATION OF LINCOLN UNIVERSITY OF PENNSYLVANIA APPLICATION FOR CHARTER**

We, the undersigned, are the duly constituted officers of the group of Alumni and former students, are professionally affiliated or geographically located in the area of:

Professional Affiliation \_\_\_\_\_ (examples include Health Services, Education, Law, Military, etc.)

**or,**

City State/Country \_\_\_\_\_

We hereby affirm that each of the proposed Officers listed below have received, read and are familiar with the current AALU Constitution (National).

We hereby affirm and have provided as an attachment to this application, signed Non-Disclosure Agreements for each of the proposed Officers listed below.

We hereby make application for a Charter for this group to be known as the \_\_\_\_\_ Chapter of the General Alumni Association of Lincoln University of Pennsylvania.

Signed:

\_\_\_\_\_, President

\_\_\_\_\_, Vice President

\_\_\_\_\_, Secretary

\_\_\_\_\_, Treasurer

Date \_\_\_\_\_

\_\_\_\_\_, Chapter Representative

PLEASE RETURN this application with the Charter fee of \$25 the General Alumni Association of Lincoln University, P.O. Box 8522, Silver Spring, Maryland 20907-8522.

A list of at least five financial members of the Association (The minimum number for official recognition of an Alumni Chapter) should accompany this application. If dues have not been paid by at least five members, then their dues should be sent along with the Charter fee. All checks should be made payable to the LU General Alumni Association.

# AALU CHAPTER OFFICER NON-DISCLOSURE AGREEMENT

THIS NON-DISCLOSURE AGREEMENT (the "Agreement" dated \_\_\_\_\_

BETWEEN:

**THE ALUMNI ASSOCIATION OF LINCOLN UNIVERSITY PENNSYLVANIA**

*OF THE FIRST PART*

AND

\_\_\_\_\_, a \_\_\_\_\_ Chapter  
(Name of Officer) (Name of Chapter)

Officer and Member of the Alumni Association of Lincoln University Pennsylvania

*OF THE SECOND PART*

BACKGROUND:

A. The Alumni Association of Lincoln University, AKA, The General Alumni Association of Lincoln University and \_\_\_\_\_ do hereby enter into a confidentiality agreement with

regard to:

Access to information and discussions pertaining to the \_\_\_\_\_  
(Name of Chapter)

Alumni Association of Lincoln University. The personal information of Alumni and others who may seek to participate in Chapter events, attain membership, pay dues, make contributions shall be held in strict confidence and in accordance with the privacy laws of the jurisdiction in which this Chapter is Chartered and the Association as Chartered within the Commonwealth of Pennsylvania. Matters of the Chapter or AALU under consideration by the AALU Executive Council shall also be held in confidence until announced by that body to the general membership of the Association. This may include but is not limited to information about decisions or actions taken on behalf of the Association, its finances, the maintenance of State and Federal Tax obligations, and the preservation of the AALU 501(c)3 Non-Profit status.

B. In connection with the aforementioned permitted purpose, the Chapter Officer/Member as identified herein will receive confidential information.

**MANAGEMENT:**

*IN CONSIDERATION AND AS A CONDITION OF* the Chapter/Alumni Association of Lincoln University providing the Confidential Information to the Chapter Officer and Member in addition to other valued considerations in the receipt and sufficiency of which consideration is hereby acknowledged by the parties to this Agreement agree as follows:

1. All written, digital, audio, visual, presentations, oral information and conversations, and other materials disclosed or provided by the Chapter/AALU to the Officer and Member under this agreement, constitutes Confidential Information regardless of whether such information was provided before or after the date of this agreement or how it was provided to the Chapter

Officer/Member. No individual shall falsely represent themselves as an agent of the Chapter or the Association.

presenting themselves as representatives of the organization including but not limited to the following:

- a. Any documents, intellectual property, or digital information.
- b. The names of individuals, addresses, phone, email or other contact information shall be used for the Chapter's/Association business. I understand I may not collect hold or maintain any Chapter or Association database for my personal use. I understand I am not authorized to disclose any information to which I am privileged to third parties without the written permission of the individual, to whom the information may belong, the Chapter, and/or the AALU. The content of phone meetings and conversations (live or recorded) shall be held in confidence.
- c. Accounting information which includes without limitation, all financial statements, annual reports, Treasurer Reports, balance sheets, asset information, liability information, revenue information, bonding information, accounts receivable, accounts payable, and/or the purchasing information of the Chapter/AALU.
- d. Individuals are strictly prohibited from taking or recording images of Confidential Information. The unauthorized dissemination of the electronic recording (visual and/ or audio) of a meeting at which Confidential Information is being discussed is prohibited.

2. Confidential Information will not include the following information:

- a. Information that might generally be known by or generally available to the members of the Chapter/Alumni Association of Lincoln University and/or community at large.
- b. Information that is now or subsequently becomes generally available to the public through no wrongful act of the Chapter Officer/Member.
- c. Information rightly in the possession of a Member prior to the disclosure by the Chapter/AALU.

3. Except as otherwise provided in this agreement, Confidential Information will remain the exclusive property of the Chapter/AALU and will only be used for the permitted purpose. The Chapter Officer/Member will not use Confidential information for any purpose that might be directly or indirectly detrimental to the Alumni, the AALU, Chapters or Lincoln University (Pennsylvania).

4. The obligations to ensure and protect the confidentiality of the Information imposed on the Chapter Officer/Member in this Agreement and any obligations to provide notice under this Agreement will survive the expiration or termination as the case may be, of this Agreement and those obligations will last indefinitely.

5. The Chapter Officer/Member may only disclose Confidential Information or other information as follows:

- a. The Chapter Officer/Member may inform parties that he/she has signed and is bound by an Agreement of Non-Disclosure.
- b. The Chapter Officer/Member agrees to be responsible for and indemnify the AALU for any breach of this Agreement.
- c. Confidential Information may be disclosed to the extent required by law or by the request or requirement of any judicial, legislative, administrative, or other governmental body or Officer of the Executive Committee.

6. Should the AALU grant additional access to any Confidential Information, the specificities of the information to be released will be made known and its use will be clearly identified. If no secured and/or designated Chapter or AALU office is available, the Chapter Officer/Member agrees to retain Confidential Information in their residence and to store all Confidential Information separate from other information and documents held in the same location where it may not be reproduced, transformed, undergo digital alteration, or translation into another language. The Chapter Office/Member is responsible for keeping track of any Confidential Information in their possession. Confidential Information should not be stored on a computer

or device that is accessible to persons to whom disclosure is not authorized and agreed to per this agreement.

- a. When requested by the AALU, any Confidential Information in the possession of the Chapter Officer/Member must be provided or returned immediately. Copies or duplication of any kind is prohibited.
- b. The AALU directs, all notes, memoranda, reports, references, other works etc., created upon review of Confidential Information by the Chapter be turned into an AALU Executive Officer, be deleted and/or destroyed. If destroyed, the Chapter Officer must provide and return a Certificate of Destruction.

Nothing in this Agreement will grant or convey to the Chapter Officer/ Member, either expressly or implied, any right, entitlement, or other interest or ownership of the Confidential Information provided to them by the AALU.

7. The Chapter Officer/Member agrees and acknowledges that the Confidential Information is of a proprietary and confidential nature and that any disclosure of the Confidential Information to a Third Party in breach of this Agreement cannot be reasonably or adequately compensated for money damages and would cause irreparable damage and injury to the AALU. Accordingly, the Officer and Executive Committee Member understands the AALU is entitled to, in addition to all other rights, and remedies available under the law or in equity, an injunction restraining the Officer and Executive Committee Member or their agents, from directly or indirectly, committing or engaging in any act restricted by this Agreement in relation to the Confidential Information.

## **LEGAL**

1. Prompt written notice will be provided should any Chapter/Member be provided to disclose in a civil, criminal, administrative, or regulatory proceeding any Confidential Information to allow the AALU to seek remedy or waive the Chapter Officer/Member's compliance with the provisions of this Agreement.
2. If the Chapter Officer/Member loses, causes or makes unauthorized disclosure of any of the Confidential Information, they will make immediate notification to the Chapter/AALU and take all necessary steps to retrieve or regain the lost or improperly disclosed Confidential Information.
3. In supplying the Confidential Information, the Chapter/AALU makes no representation expressly or implied as to its adequacy, sufficiency, completeness, correctness, or its lack of defect of any kind.
4. Either party may terminate this agreement upon written notice to the other party. Except as otherwise provided in this Agreement, all rights and obligations will terminate at that time.
5. The Chapter Officer/Member and the Chapter AALU, acknowledge that this Agreement is reasonable, valid and enforceable.
6. No failure or delay by the Chapter/AALU as the Confidential Information provider in exercising any power, right, or privilege provided in this Agreement will operate as a waiver, nor will any single or partial exercise of such rights, powers or privileges, preclude any further exercise of them or the exercise of any right, power or privilege provided in this agreement.

**GOVERNANCE**

This Agreement will be construed in accordance with and per the laws governing the \_\_\_\_\_.

The Chapter Officer/Member is liable for all costs, expenses, and expenditures including and without limitation, the complete legal costs incurred by the Chapter/AALU in enforcing this Agreement as a result of any default of this Agreement by the Officer and Executive Committee Member.

This Agreement constitutes the entire Agreement between the parties and there are no further items or provisions, implied, oral, or otherwise.

IN WITNESS WHERE OF: \_\_\_\_\_ and  
*( NAME CHAPTER OFFICER/ MEMBER )*

\_\_\_\_\_,  
*(PRESIDENT, AALU)*

on this \_\_\_\_\_ day of \_\_\_\_\_, 201\_\_.

WITNESSED BY:

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

# **CONSTITUTION AND BY-LAWS**

## **ALUMNI ASSOCIATION OF LINCOLN UNIVERSITY PENNSYLVANIA, INC**

### **ARTICLE I – NAME**

The name of the organization shall be: Alumni Association of Lincoln University, Pennsylvania, Inc.

### **ARTICLE II – PURPOSES**

#### **Mission Statement**

The Alumni Association of Lincoln University, Pennsylvania, Inc. (Association) is an IRS Section 501(c)(3) charitable membership organization dedicated to advancing the interests of Lincoln University PA(University) and its graduates.

The purposes of this Association shall be:

- A) To cultivate and foster a close fellowship among graduates, Alumni Chapters and former students of Lincoln University.
- B) To encourage financial support for Lincoln University
- C) To assist in the recruitment of students to Lincoln University
- D) To work cooperatively with Lincoln University personnel to develop and implement programs that will benefit Lincoln and the Alumni Association of Lincoln University, PA, Inc.

### **ARTICLE III – MEMBERSHIP**

Membership shall consist of Life, Regular, Honorary and Associate Categories

### **ARTICLE IV – OFFICERS**

The elected officers shall consist of a President, Vice President and Treasurer. The appointed officers shall consist of: Four Regional Directors, Chaplain, Historian, Financial Secretary and Parliamentarian. The Executive Secretary shall be a contract position.

### **ARTICLE V – MEETINGS**

The annual meeting of the Association shall be held in October on a date and time determined by the Executive Committee. The Preferred location shall be on the campus of Lincoln University. The Council shall have minimum of 3 regular meetings per fiscal year. The

Association shall have a minimum of 2 meetings per fiscal year. The Fiscal year of the Association shall begin on July 1 and End on June 30.

### **ARTICLE VI – COUNCIL**

The duty of the Council is to serve as the governing body of the Alumni Association and to administer the policies of the Association. The Council shall consist of the officers of the Association, alumni trustees, committee chairpersons, and (1) one chapter representative from active chapters.

## **ARTICLE – VII COMMITTEES**

The Standing Committees shall be the Executive, Nominating, Ways and Means, Program, Audit, Membership and Sunshine Committees. All other committees are ad hoc and created at the discretion of the President and the Council.

## **ARTICLE VIII – PARLIAMENTARY AUTHORITY**

The Parliamentary Authority shall be Robert's Rules of Order Newly Revised Edition.

## **ARTICLE IX – AMENDMENT OF CONSTITUTION**

Amendments to this constitution as presented by the Constitution Review Committee may be ratified at any regular meeting of the Association by two-thirds vote. Proposed amendments must be submitted in writing to the Council at least 60 days prior to a Regular Meeting. All proposed amendments shall be disseminated to the membership 30 days prior to the regular membership meeting.

## **CHAPTER 1 – MEMBERSHIP**

### **Section 1 – Classification**

The membership of the Association shall consist of Life, Regular, Honorary and Associate categories.

### **Section 2 – Qualifications**

**A. Life:** All graduates of Lincoln University who have made the required lifetime financial contribution to the Alumni Association of Lincoln University, Pennsylvania, Inc., or who are holders of certificates or equivalents from programs or who have completed at least one year of study at Lincoln University, Pennsylvania.

**B. Regular:** All graduates of Lincoln University who have made the required yearly financial contribution to the Alumni Association of Lincoln University, Pennsylvania, Inc., or who are holders of certificates or equivalents from programs or who have completed at least one year of study at Lincoln University, Pa.

**C. Honorary:** All recipients of honorary degrees, the President of the University and all members of the faculty (non-graduates) holding rank of Professor. Honorary members shall not hold office or have voting privileges.

**D. Associate:** All members of the faculty (non-graduates). The holders of certificates or equivalents from programs as sanctioned by the Council, or who have completed at least one year's work. Associate members shall not hold office or have voting privileges.

## **CHAPTER II – MEETINGS:**

### **Section 1 - Annual Meeting**

There shall be an Annual Meeting of this Association which will be held commensurate with Homecoming in October at Lincoln University. Notice of such meeting shall be mailed to all members at least thirty (30) days in advance of such meeting. Thirty (30) or more members shall constitute a quorum for the transaction of business.

### **Section 2 - Regular Meetings**

There shall be at least two regular (general membership) meetings during the fiscal year. Meetings shall occur during, October (Homecoming) and May. All members current in their financial responsibilities shall have voting privileges.

### **Section 3 - Special Meetings**

Special meetings of the Council may be called by or at the request of the Chair (if one has been duly elected), or by fifty-one (51) percent of the polled Council. Such meetings may be held either within or without the Commonwealth of Pennsylvania.

## **CHAPTER III – OFFICERS**

### **Section 1- Number and Title**

There shall be thirteen (13) officers. The elected officers of the Association shall be a President, Vice President, Treasurer, and Six (6) Alumni Trustees.

### **Section 2 – Eligibility All Elected and Appointed Officers of the Association:**

- (a) Shall be current in their financial responsibilities with the Alumni Association by the October Council meeting prior to the next election;
- (b) Shall be current in their financial responsibilities with their local chapter (if established) one year prior to the election;
- (c) Shall not be an employee of the University;
- (d) Shall not hold any other elected office in the Association.

### **Section 3 – Nominations**

The Nominating Committee shall present to the Council during the October meeting a slate of candidates for officers listed in Chapter III,

- (a) Nominations from the floor are permitted at the Fall meeting provided by petition, signed by at least ten (10) percent of the members current in their financial responsibilities to the association.

#### **Section 4 – Tenure of Office**

The term of office shall be two years for all elective and appointed officers of the Association. The term of office for Alumni Trustee shall be four years. No more than two trustees shall be elected each year. No officer or A Alumni trustee shall serve more than two (2) consecutive terms in the same office.

#### **Section 5 – Installation Service**

The newly elected officers shall assume their respective offices at the conclusion of the Annual Meeting at which they were elected.

#### **Section 6 – Recall / Removal of Officers**

(a) Officers elected by the membership, with the exception of alumni trustees, may be recalled/removed from office, with cause, by a 2/3 vote of the membership.

(b) The call for removal or recall with cause may be presented to the executive committee for consideration by any member of the Council presented with petition of 1/3 of the membership.

(c) The determination to proceed with this action must be made by the council with a simple majority vote.

(d) The vote will be called by the executive committee and must occur at a regular council meeting or a special meeting called by the executive committee for this purpose. Notice of the recall agenda item at the regular meeting or as the purpose of the special meeting must be provided to the membership a minimum of 2 weeks prior to the meeting by regular postal mail or electronic mail.

(e) An affirmative vote to proceed by the council shall result in the suspension of the accused officer from all duties until an election is held within 30 days of the suspension action.

(f) The President or the Vice President, in the absence of the President, shall appoint an interim officer to serve until the election results are determined.

(g) Ballots for the election shall be administered within 10 days of the suspension action to all members current in their financial responsibilities.

(h) The council shall administer the election.

#### **Section 7: Resignation**

Any officer may resign at any time by communicating their resignation in writing via certified mail to the AALU Executive Secretary and the President. A resignation is effective when it is received unless the notice specifies a later effective date or subsequent event upon which it will become effective. Resignation shall not be granted until all property of the Association in the possession of the officer is returned to the Association.

## **Section 8 - Bonded Officers**

The Bonded officers of the Association Shall are the President, the Treasurer and the Executive Secretary. These Officers shall be bonded at the expense of the Association.

## **CHAPTER IV – DUTIES OF OFFICERS**

### **Section 1 – President**

The duties of the President are:

- (a) To preside at all meetings and functions of the Association and to serve as the Chairperson of the Executive Committee.
- (b) To appoint Chairpersons and members of all committees not directly elected by the Association, except the Nominating Committee.
- (c) To exercise general executive authority on behalf of the Association, and such authority is subjected t the approval of the Association.
- (d) To assure that the purposes of the Association are being carried out.
- (e) To countersign all requisitions for disbursements from the Association’s treasury.
- (f) To countersign all Association checks
- (g) To perform such further functions and duties as may be deemed appropriate by the Association or the Executive Committee.
- (h) To serve ex-officio member of all committees except the Nominating Committee.
- (i) To fill vacancies in Association offices, exclusive of Alumni Trustees, by appointing Association members in good standing to serve as interim officers. Such persons must be approved by the Executive Committee and shall serve until the next Association election.
- (j) To fill the vacancy created by Alumni elected Trustee by Nominating an Association members in good standing to complete the term left vacant. The nominee must be approved by a simple majority of The Council.
- (k) To present an official report on the state of the Association at the Annual meeting of the Association, including the actions taken to meet the objectives of the Association since the last official report.

### **Section 2 – Vice President**

In the absence of the President, the Vice President shall serve in place of the President. The Vice President will work with the Director of Alumni Relations and the Regional Directors to develop alumni chapters and other duties assigned by the Executive Committee and/or Council. Shall submit a report to the Executive, Council and Annual meetings of the Association.

### **Section 3 – Executive Secretary**

A. The duties of the Executive Secretary shall be :

(a) To keep an accurate record and minutes of all meetings held by the Association, and will be responsible for distributing the previous Association meeting minutes at the next meeting.

(b) To receive and send correspondence for the Association, maintain an up-to –date and appropriate file of all such correspondence, and notify the membership of meetings of the Association.

(c) To have charge of the central office of the Association and management of the office under the direction of the council

(d) To serve as the secretary for the Council, Annual Meeting and the Executive Committee.

(e) To keep an accurate membership directory

(f) To keep a necrology list of members and present a report to the Annual Meeting.

(g) To submit a report at the Executive, Council, and the Annual Meetings of the Association for the current year.

(h) To keep an accurate record of all funds received and disbursed by the Association

(i) To work closely with the Treasurer and other secretaries to carry forth the functions of this office.

**B.** The Executive Secretary shall be employed by the Executive Committee and certified by the Council on an annual contract. The Executive Committee reviews the contract annually. The Executive Secretary shall be an alumnus/na of Lincoln University and shall be a non-voting employee who serves under the direction of the Council. The Executive Secretary shall be remunerated for his/her services, authorized travel and pre-approved expenditures to the Association with the submission of proper invoices and receipts in accordance with the rules and regulations of the Internal Revenue Service.

### **Section 4 – Treasurer**

The duties of the Treasurer shall be:

(a) To receive and deposit all monies of the Association promptly in an account or accounts in a responsible institution approved by the Association. No money shall be withdrawn from any such account except by checks signed by the Treasurer and countersigned by the President.

(b) To submit reports to the Association at all regular meetings or whenever required by either the body, covering the financial condition of the Association.

(c) To prepare and submit a full annual financial report to the Auditing Committee long enough in advance for an audit to be completed before the report is made at the annual meeting.

(d) To reimburse payees with proper itemized receipts for pre-approved activities.

(e) Shall be bonded at the expense of the Association.

(f) To: Provide remuneration to employee/employees of the Association in accordance with all applicable rules and regulations of the Internal Revenue Service.

## **Section 5 – Regional Directors**

### **1. Regions:**

(a) North- New England states, New York, New Jersey, Pennsylvania, Delaware, Maryland, Virginia, West Virginia and Washington, DC

(b) South- North and South Carolina, Georgia, Florida, Mississippi, Arkansas, Louisiana, Tennessee, Alabama, and Kentucky

(c) Central: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

(d) West: Alaska, Hawaii, California, Texas, Oklahoma, New Mexico, Arizona, Oregon, Washington, Idaho, Utah, Wyoming and Montana

### **2. The duties of the Regional Directors are:**

(a) To be responsible for the development and continued activity of chapters in their areas.

(b) To work closely with the Director of Alumni Relations

(c) To perform other duties as deemed by the President

(d) To submit a report to the Executive, Council and Annual meetings of the Association.

## **Section 6 – Chaplain**

The Chaplain shall recite or lead invocations and benedictions at the opening and closing of meetings or other services.

## **Section 7 – Parliamentarian**

The Parliamentarian shall advise the President and other officers, members, and committees on matters of parliamentary procedures.

## **Section 8 – Historian**

The Historian shall prepare a narrative account of the Association's activities during his/her term in office, which, when approved by the Association, shall become a permanent part of the Association's official history.

## **CHAPTER V – COMMITTEES**

### **Section 1 – Standing Committees**

The Standing Committees of the Association shall consist of the Executive, Nominating, Finance, Auditing, Publicity, Program, Ways and Means, Membership and Sunshine Committees.

### **Section 2 – Executive Committee**

The Executive Committee shall be composed of the elected officers of the Association and shall have the general control of the affairs and programs of the Association subject to the authority of the Council, and the provisions of the by-laws. The quorum of the Executive Committee shall be one-third of the Committee's total membership. The Executive Committee shall be responsible:

- (a) To approve the creation of special committees as needs arise
- (b) To approve interim Association officers appointed by the Association President to fill all vacancies in Association offices.
- (c) To decide matters of Association policy subject to endorsements by the Council.

### **Section 3 – Nominating Committee**

The Nominating Committee shall be composed of five members who shall be elected at the annual meeting of the Association. The member receiving the highest number of votes shall be the chairperson of the committee. If this situation does not occur, the members of the committee shall elect its own chairperson. The Nominating Committee shall oversee the election process after its report is formally presented to the assembly. If one of the nominees withdraws before the election, the committee shall be re-convened and must meet within 2 weeks to agree upon another nomination. Members of the Nominating Committee may become nominees for an elective office themselves; however once they agree to become a nominee they must resign from their nominating committee position. In the event that a member of the nominating committee resigns, The President must nominate a replacement committee member within 30 days. The nominee must be approved by a simple majority of the Executive Committee.

### **Section 4 – Finance Committee**

The Finance Committee shall be composed of the Treasurer and four other members appointed by the President before the annual meeting. The Finance Committee shall prepare a budget for the program year beginning the first day of July and to submit it to the Council at its regular meeting in May. The Finance Committee shall from time to time submit supplements to the budget.

### **Section 5 – Auditing Committee**

The Auditing Committee shall be composed of three members appointed by the President at the Annual Meeting who shall be responsible for auditing the Treasurer's accounts at the close of the program year and present a report to the Council at the Fall meeting.

### **Section 6 – Publicity Committee**

The Publicity Committee shall be composed of three Council members appointed by the President. The function of the Publicity Committee is to positively publicize the Association's members and events to all available media.

### **Section 7 – Program Committee**

The Program Committee shall be composed of five members appointed by the President promptly after the annual meeting. The Program Committee shall be responsible for planning the annual program of the Association, including how it can accomplish the objectives spelled out in the Constitution. This committee's report shall be submitted to the Association for its approval at its regular meeting in October.

### **Section 8 – Ways and Means Committee**

The Ways and Means Committee shall be composed of five members from the Council chosen by the President. The function of this committee will be to coordinate fund raising efforts of the Association.

### **Section 9 – Sunshine Committee**

The Sunshine Committee shall consist of three members of the Association. The purpose of the Sunshine Committee is to provide for the health and welfare of the membership as needed.

### **Section 10 – Membership Committee**

The Membership Committee shall consist of five members of the Association. The purpose of the Membership Committee is to recruit new members (dues paying) retaining current members and reclaiming inactive members of the Association.

## **CHAPTER VI- Chapter Authority**

It shall be the sole authority of the AALU to formulate, establish, create and recognize all alumni chapters. Local chapters of the General Alumni Association shall be formed by authorization of the Executive Committee on the application of five (5) or more members who are current in their financial responsibilities residing in a contiguous territory subject to the following conditions:

- 1) The number of Chapters in any given area locality shall be determined by the Council.

2) After approval by the Executive Committee of the application for establishing a local chapter of the Alumni Association, a charter signed by the President and Secretary shall be issued upon payment of a fee established by the Council.

3) A Chapter failing to hold at least two meetings during a calendar year may be asked to surrender its Charter if such action is voted on by the Council.

Revised – October, 2000  
Revised – November, 2000  
Revised – January, 2001  
Adopted – May 5, 2001  
Revised – February 2013  
Adopted – May 11, 2013



# GRADUATES FOR LIFE

Transforming alumni associations into alumni communities for the career school and college sector

By Dr. Susan F. Schulz, Susan F. Schulz and Associates

**W**hat do you think of when you hear alumni association? Probably fundraising? Homecoming? A football game? And definitely expect a request for a check!

Something new is happening to alumni associations in the career school sector. They're transforming into alumni communities. Alumni communities are developing to show grads that their school, regardless of size, will never leave them. Alumni communities are one of the innovative trends occurring in our sector.

Alumni communities offer ongoing benefits and services to meet the needs of career school grads as they enter the next phase of their lives. This includes addressing the loss of school friendships, the job search dilemma, challenges of real work, and the possibility of job loss or not getting a job at all.

Alumni communities benefit career schools. Implemented effectively, they impact key areas of the school: enrollment, retention, graduation, placement and, now, gainful employment.

With an alumni community, you will never hear your staff say, "After graduation, we can't find them," or "We have no current contact information to know if they are gainfully employed or meet the income-to-debt ratio."

How do you start an alumni community at your school? Following is a brief summary of best practices reported by Alumni Directors June Gudeman from Pima Medical Institute (PMI), Allan Langer from New England Institute of Technology (NEIT), Chad Major from Rasmussen College, and Robert Starks from Collins College.

## **Alumni Communities are developing to show grads that their school, regardless of size, will never leave them.**

Getting started is always a challenge. The key is to find the driving force to make it happen. This is often the president or owner – a very important person since budget and funding are vital to success. There are many barriers to getting started, and all can be "managed." This includes establishing the time, funding and priority on the list of other school challenges.

What's the next task when setting up an alumni community? Our experts agree that creating a strong foundation is important to success. This means an advisory board,



website, buy-in from other departments and, of course, a budget. Deciding on an alumni director is next. The choice was easy at PMI and NEIT. The owners made the decision. The alumni director can be someone from outside the school or your career services director, who is already working with grads.

Getting involvement from the entire school is important. Therefore another initial step is to engage your directors of education, student services, marketing and admissions. Let them know how they will benefit and also what is expected of them to make your alumni program a success. Another important person to involve is your IT person. He or she has to work with you to set up ways to manage alumni records through your student information management system. You'll especially need ways to measure results.

**Eventually time will show the number of increased enrollments, retention, and job openings that result from Alumni, but it doesn't happen right away.**

A dedicated alumni website is a must. Alumni experts say the website has to be easy to read, list services and events, focus on graduate success stories, and provide a way to drive traffic to the site. PMI requires grads to request transcripts via the website. The process requests grads to update their contact information to be sure you always stay connected.

The new look in career school alumni communities focuses on benefits FOR the grad and not on fundraising. Membership benefits can include anything of value, such as discounts, networking, free audits of classes, specialty training, technology updates, events, use of any campus and any library, scholarships, and more. Membership should be automatic and free.

If the focus is not on fundraising, what does the innovative career school alumni community want from its grads? The list is endless and includes: enrollment referrals, assistance in the classroom, introductions to hiring

decision makers where grads work, speakers, instructors, advisory board members, curriculum reviewers, job shadowing opportunities, and more.

What's the secret to communicating with alumni? Electronic seems to work the best according to all of the alumni directors. Email, ezines and social media like Facebook are effective. Events also get a lot of attention. But seasoned alumni directors say to wait to hold the first event until you have a strong foundation in place.

Is fundraising a part of the revolutionary new look in career school alumni communities? Most would say no. But the folks at NEIT have been successful in raising money for their building fund. They have an unusual situation where over 75 percent of their grads still live and work near the school, which has been part of the community for over 40 years.

Measuring success and return on investment is a challenge each alumni director admitted. Collins College focuses on measuring engagement, trends and any change. Eventually time will show the number of increased enrollments, retention and job openings that result from alumni, but it doesn't happen right away.

There is a quick and easy way for schools to determine the viability of setting up an alumni community at their campus. MaxKnowledge offers an online course: PL 105 – Setting up an Effective Alumni Association. It is facilitated by Gudeman of PMI, who has been head of the alumni community there for over eight years.

Harris N. Miller, former APSCU President and CEO, wrote about innovation in career schools in the Summer 2011 *Link*, saying, "Forward thinking is absolutely critical," and that's what the transformation of alumni associations into career school alumni communities is all about. 🌐



*Dr. Susan F. Schulz, owner of Susan F. Schulz & Associates, Inc. and Schools for Sale International, Inc., has been researching the transformation of career school Alumni associations for the past year. She has given six presentations at various conferences and, most recently, for the second time at APSCU.*

# **SAMPLE MEMBERSHIP ROSTER**

**CHAPTER NAME**

**Membership Directory**

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<b>Member Name</b>	<b>555-0100(home)</b>
<b>Street Address</b>	<b>555-0101(work)</b>
<b>City, ST ZIP Code</b>	<b>555-0102(cell)</b>
<b>E-mail/Website address</b>	<b>555-0103(fax)</b>

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<b>Member Name</b>	<b>555-0100(home)</b>
<b>Street Address</b>	<b>555-0101(work)</b>
<b>City, ST ZIP Code</b>	<b>555-0102(cell)</b>
<b>E-mail/Website address</b>	<b>555-0103(fax)</b>

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<b>City, ST ZIP Code</b>	<b>555-0102(cell)</b>
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