

# **UW Oshkosh Alumni Association Chapter Handbook**

## **The UW Oshkosh Alumni Association's Mission and Vision**

### **Vision – UW Oshkosh Alumni Association**

The University of Wisconsin Oshkosh Alumni Association will be the primary link between the University and its alumni.

### **Mission – UW Oshkosh Alumni Association**

The University of Wisconsin Alumni Association serves alumni by representing, informing, and providing opportunities for engagement with, and support of, the University.

Dear UW Oshkosh Alumni Chapter Leader:

Thank you for your interest in serving as a leader for your UW Oshkosh Alumni Association alumni chapter.

This handbook contains basic policies, procedures and guidelines that will help you address many of the issues that may arise as you lead your chapter. We invite you to contact the Alumni Relations Office at any time for further guidance at (920) 424-3449, toll-free 877-896-2586 or e-mail [alumni@uwosh.edu](mailto:alumni@uwosh.edu). We are always available to assist you.

It takes time and energy to lead a chapter and to offer a diverse range of programs. I'm confident that you will find your volunteer experience to be a positive and rewarding one, and I know you will make a difference in your chapter and in the lives of fellow UW Oshkosh alumni. We appreciate your dedication and continued commitment to your UWO Alumni Association chapter, the UWO Alumni Association, and to your alma mater.

Sincerely,

Scott Barr '86  
President, UW Oshkosh Alumni Association

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# I. Your UW Oshkosh Alumni Association

## UW Oshkosh Alumni Relations staff

**Christine Gantner**, Alumni Director  
(920) 424-0625  
[gantner@uwosh.edu](mailto:gantner@uwosh.edu)

Christine has served as alumni relations director since 1998. She helps alumni remain connected to their alma mater through [publications](#), the alumni Web site, special events on campus and [alumni events](#) held in various communities. The best part of her job is working with great people and meeting with dedicated alumni who realize what a difference UW Oshkosh has made in their lives.

**Natalie Johnson**, Alumni Communications Manager  
(920) 424-3362  
[johnsonn@uwosh.edu](mailto:johnsonn@uwosh.edu)

Natalie Johnson keeps all the lines of communication open for alumni through the alumni Web site, alumni news in UW Oshkosh Today and UW Oshkosh's Engage magazine, as well as with social networking tools like Twitter, Facebook and LinkedIn. An experienced writer and editor, she enjoys meeting and interviewing UWO's stellar alumni and sharing their success.

**Theresa Braatz**, University Services Associate  
(920) 424-3449  
[braatzt@uwosh.edu](mailto:braatzt@uwosh.edu)

Theresa is the University services associate in alumni relations, providing administrative support for the office, maintaining the alumni database of nearly 87,000 records, supporting numerous alumni events and managing student employees. She also works a second job as the executive director of the Doug & Carla Salmon Foundation, which awards student scholarships. Theresa graduated from UW Stevens Point.

## Contact us

E-mail: [alumni@uwosh.edu](mailto:alumni@uwosh.edu)

Phone: (877) UWO-ALUM or (877) 896-2586

Fax: (920) 424-7010

Address:

University of Wisconsin Oshkosh Alumni Relations Office  
Alumni Welcome & Conference Center, 625 Pearl Avenue, Oshkosh, WI 54901

**The UW Oshkosh Alumni Relations staff will help answer your questions, aid in locating interested alumni, assist in sending out communication to potential members and offer general guidance.**

## II. UW Oshkosh Alumni Association Chapters

### Purpose

Alumni Chapters are established by alumni who are interested in developing activities and programs that promote and enhance the image of the UW Oshkosh Alumni Association and the University and provide an opportunity for alumni in a specific geographical region or specific affinity group (ie Reeve Union Board alumni, Greek alumni, alumni athletes, etc...) to connect socially and professionally.

### Establishing an Alumni Association Chapter

1. Identify a group of interested alumni.
2. Hold a reception for alumni to meet one another and conduct a follow up meeting. Discuss the purposes and objectives of the Chapter and complete the Alumni Chapter Letter of Intent and Chapter Agreement found at <http://www.uwosh.edu/alumni/alumni-chapters>. Send a summary of the event/meeting along with a sign-in sheet of the persons attending to the UWO Alumni Office.
3. Discuss and plan events/programs for the year. Your UWOOA Chapter should meet at least annually and conduct at least one activity each year.
4. Invite as many alumni as possible via e-mail or phone from the list generated by the Alumni Office and remind them of upcoming meetings and events.
5. An annual schedule of events must be provided to the Alumni Association by May 1 of each year.

### Responsibilities of the Chapter Leader

1. Maintain at least annual contact with the Alumni Relations office.
2. Prepare a brief Chapter annual report including budget and schedule of events for the following year and submit it to the Alumni Relations office by May 1.
3. Cultivate and recruit Chapter members.

### Promotion of chapter events/activities:

- Alumni Relations office will announce and promote upcoming activities via e-mail
- Chapter activities can be promoted in the **Alumni News monthly e-newsletter**, which is published the first Friday of each month. Submit your stories/photos to Natalie Johnson at [johnsonn@uwosh.edu](mailto:johnsonn@uwosh.edu) by the 21<sup>st</sup> of each month.
- Each Chapter will be provided space on the Alumni Web site. Alumni Association Chapter events and contact information for Chapter leaders will be posted. Submit web content to [alumni@uwosh.edu](mailto:alumni@uwosh.edu).
- UWOOA can provide promotional materials and giveaway items for Alumni Association Chapter events.

## **Appendix 1: Event Planning Guide**

Define purpose of event, type of event, potential dates, potential speaker(s), and location. Considerations include downtown or suburban, weekday or weekend, rental charge, deposit requirement, and parking.

Prepare nametags for those who have sent reservations ahead of time and have a supply of blank nametags & holders for those who show up unannounced.

Prepare a list ahead of time for those who have indicated they will attend. For events requiring payment, keep a record of those who have paid and who are to pay at the door.

Have a sign-in list with spaces for name, address, phone, e-mail and class year. This will help in making up the report to be sent to the Alumni Relations office. It will also help the hostess/host to check the names of incoming guests.

Keep the meeting sign-in list in the Chapter's records and send a copy to the Alumni Relations office.

### **Event planning timetable (use as a general guide, not all types of events require the same amount of planning)**

#### **A. Two to Four months before**

Complete preliminary planning at a Chapter meeting. E-mail important information to the Alumni Office (date, time, location, directions, price, RSVP phone #'s, deadline to RSVP, etc.) Reserve venue. Inquire about parking/transportation.

#### **B. Two to Three months before**

Hold a meeting with Chapter's leaders and assign duties to members.

#### **C. One to Two months before**

Follow up with team members on the progress of their assignments. Finalize event details including who will greet people and who will make introductory remarks, announcements and closing comments. Inform the Alumni Relations office of additional materials needed such as UWO name tags, table cloths, signage, handouts and promotional items. Have electronic invitations designed. If serving food, plan the menu and determine if you need people to help serve.

#### **D. Four to Six weeks before**

Begin promoting the event. An e-mail blast will be sent from the Alumni Relations office to the Chapter's alumni.

#### **F. Two to Three weeks before**

Reservations begin to come in. Compile RSVP list.

### **G. Two weeks before**

Evaluate the response of the reservations. If numbers are low, send additional e-mails or make phone calls. Make arrangements for any equipment needs such as laptop, projector, screen, extension cord, podium, microphone and registration table.

### **H. One week before**

Finalize all details and confirm number attending with the venue/caterer. Prepare name tags and assemble handouts, promotional items, door prizes and signage.

### **I. 72 hours prior to the event**

Provide caterer with final anticipated attendance count.

### **J. Day of the event**

- Arrive at the location at least 1 hour early
- Set up registration table
- Ensure for proper signage
- Ask people attending your event to sign in or provide their business cards. Then within two weeks of these events, provide the UWOOA with the names and contact information (especially e-mail addresses) of those attending your Chapter functions so we can keep our database updated.

### **K. Within one week after the event**

- Write thank-you notes
- Turn in sign-in sheets to Alumni Relations office
- Turn in reimbursement form (if necessary)

## Appendix 2: Sample Alumni Chapter meeting report

(Please complete following each Chapter meeting and e-mail to alumni@uwosh.edu)

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_ **Location:** \_\_\_\_\_

**Purpose:** \_\_\_\_\_

**Attendance:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Guest(s):** \_\_\_\_\_  
\_\_\_\_\_

**Agenda:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TOPICS:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Decisions/Conclusions:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Next Steps/Assignments:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Next meeting date, agenda and duties:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Signature of Recorder:** \_\_\_\_\_



## Appendix 3: Sample Chapter Member Information Form

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Graduating year(s): \_\_\_\_\_ Major: \_\_\_\_\_

Spouse: \_\_\_\_\_ If UWO graduate degree/class \_\_\_\_\_

Your address: \_\_\_\_\_

City, State, Zip \_\_\_\_\_ eMail \_\_\_\_\_

Home phone:(\_\_\_\_) \_\_\_\_\_ Business phone:(\_\_\_\_) \_\_\_\_\_

Business name & address: \_\_\_\_\_

\_\_\_\_\_

Personal interests: \_\_\_\_\_

Memberships: *(Please indicate if it would be possible to use club facilities for an alumni gathering)*

\_\_\_\_\_

\_\_\_\_\_

# Appendix 4: Sample Chapter Annual Report Form

Primary contact: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Phone: \_\_\_\_\_

eMail: \_\_\_\_\_

## I. Chapter leader(s)

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

## II. List meetings/programs held (attach additional pages if necessary.)

EVENT	DATE	ATTENDANCE	EXPENSES
_____	_____	_____	_____
_____	_____	_____	_____

## FINANCIAL STATEMENT FOR PERIOD July 1, 20\_\_ to June 30, 20\_\_

<b>BALANCE July 1, 20__</b>	<b>\$ _____</b>
TOTAL RECEIPTS (INCOME)	\$ _____
TOTAL DISBURSEMENTS (EXPENSES)	\$ _____
<b>BALANCE June 30, 20__</b>	<b>\$ _____</b>

## III. Calendar of upcoming events

EVENT	DATE
_____	_____
_____	_____
_____	_____

Prepared by: \_\_\_\_\_ Date: \_\_\_\_\_