



COLLEGE *of*
CHARLESTON

ALUMNI ASSOCIATION

Black Alumni Council Operations Manual

March 2021

Stay Informed • Get Involved • Give Back

Background

After a decade of increasing alumni engagement through regional CofC Clubs (formerly called “Chapters”), the College of Charleston Alumni Association has decided to create a process for organizing Affinity Groups to engage alumni who share identities, experiences, interests, and/or goals. A number of university alumni associations have added affinity groups in recent years and the primary sources for the guidelines contained herein include: the Council for Advancement and Support of Education, Wake Forest University, Johns Hopkins University, Case Western Reserve University, Georgia Institute of Technology, the University of Michigan, Hanover College, Washington & Lee University, SUNY Binghamton, Colorado State University, and Cal State San Marcos, among several others. Case Western Reserve University provides the best comparison to the College of Charleston Alumni Association in terms of size (110K alumni vs. 95,000 alumni) and scope. The purpose of these guidelines is to create successful, sustainable affinity groups that will further increase alumni engagement and dovetail with the regional CofC Clubs program, with a realistic view toward the College’s and the Alumni Association’s budget, staffing, and resources. This is a working document and may be amended as needed with approval of the Alumni Association’s Executive Committee.

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I. Alumni Association Structure and Overview

The College of Charleston Alumni Association, an international organization of more than 95,000 former students of the College, has been in continuous operation since June 13, 1888. The mission of the Alumni Association as expressed in its bylaws is “to manifest interest in, and to promote the welfare of, the College of Charleston.” Put simply, *we serve the College*. The Alumni Association is updating its Strategic Plan to dovetail with the College’s new Strategic Plan, but the theme will remain to engage alumni to “Stay Informed, Get Involved, and Give Back”.

The Alumni Association is a 501(c)(3) charitable organization. Through its communications, activities, and events, the Alumni Association provides fellowship and networking opportunities for alumni and supports programs and scholarships for the College. Membership dues were eliminated in 2007 and now all alumni of the College are considered members of the Alumni Association. The Alumni Association defines “alumni” as former students who have passed at least one class at the College for credit toward a degree. Graduation from the College is not required to be considered a member of the Alumni Association.

The Alumni Association is governed by a Board of Directors and administered by the professional staff in the Office of Alumni Affairs at the College. Candidates for the Board and its leadership positions are nominated by the Alumni Association’s Nominating Committee and elected by the membership. The Alumni Association increases alumni engagement through CofC Clubs and Affinity Groups. CofC Clubs are organized regionally where there are 400 or more CofC alumni within a metropolitan area. Affinity Groups may be organized when there are 400 or more alumni (among *all* CofC alumni) interested in joining a group based on shared identities, experiences, interests, and/or goals.

CofC Clubs and Affinity Groups are bound by the Alumni Association’s bylaws, its mission to serve the College, and its Strategic Plan. The Alumni Association assumes the financial risk and insurance liability for CofC Club and Affinity Group events and activities. Because the Alumni Association is a 501(c)(3) charitable organization, the Alumni Association, its CofC Clubs, and its Affinity Groups cannot engage in political activities, such as attempting to influence legislation or supporting candidates for elected office.

II. Affinity Group Criteria and Goals

Affinity Groups, including the Black Alumni Council, are made up of alumni who are united by shared identities, experiences, interests, and/or goals. Affinity Groups serve the College by:

- Increasing alumni engagement with the College.
- Hosting events and activities that reflect positively on the College.
- Recruiting students to apply to the College and, when admitted, encouraging them to enroll.

To ensure the longevity of Affinity Groups, the Alumni Association has created five criteria for recognition:

1. Welcome the participation of all alumni interested in joining the Affinity Group.
2. Meet a minimum threshold of 400 alumni who wish to join.
3. Identify and pursue goals that promote the best interests of the College.

4. Work with Alumni Affairs staff to coordinate communications, activities, and events around Fall and Spring Alumni Weekends and CofC Day, at a minimum.
5. Conduct itself in accordance with the Alumni Association bylaws, its mission, and its Strategic Plan, and Affinity Group guidelines.

If an Affinity Group does not meet these criteria, the Alumni Association reserves the right to take appropriate action, including a change in leadership, withdrawal of event support, or termination of the Affinity Group (see Terms and Conditions section).

III. Organizing an Affinity Group

Alumni interested in organizing a new Affinity Group based on the criteria and goals as described should contact the College's Associate Director of CofC Clubs and Affinity Groups, Meredith Chance '16 at chancem@cofc.edu or (843) 953-6631. She will relay the request to be considered by the Alumni Association's Executive Committee. The Alumni Association reserves the right to combine similar requests and to decline requests that are redundant to existing Affinity Groups. Once approved, the Alumni Association will notify alumni that a request for a new Affinity Group has been received and provide an online form so individuals may indicate their interest in joining. Membership in an Affinity Group will be voluntary and interest must be indicated by the individual alumna/us directly to the Alumni Association. After a threshold of 400 interested alumni is met, the Alumni Association will solicit Affinity Group members to apply for leadership positions (described below). To ensure the Affinity Group's leadership represents the diversity of its membership, the Alumni Association's Nominating Committee will review the leadership applications and recommend a slate of candidates to the Alumni Association's Executive Committee for approval. Once Affinity Group leaders are confirmed, planning may begin for activities and events.

IV. Leadership Positions & Descriptions

Affinity Group, including the Black Alumni Council, leaders are nominated as needed by the Alumni Association's Nominating Committee and approved by the Alumni Association's Executive Committee. Terms of office are two years and coincide with the Alumni Association's fiscal year (ending June 30, starting July 1), unless appointed within a fiscal year. The following are essential positions for each Affinity Group:

President (two-year term of office; cannot serve consecutive terms)

- a. Must be an alumna/us of the College.
- b. Participates in a CofC Club & Affinity Group Leaders Training Conference at the earliest opportunity.
- c. Ensures the Black Alumni Council meets the criteria/follows the guidelines described in this document.
- d. Coordinates with the Alumni Affairs staff to convene Black Alumni Council leadership meetings on a regular basis (these may be in-person or virtual).
 - a. If virtual, an Alumni Affairs staff member will set up the meeting.
- e. Registers for and attends Black Alumni Council events and serves as Host/Master of Ceremonies.
- f. Promotes making an annual donation to the College to Black Alumni Council members and recognizes donors at events (e.g., generally in remarks, personally greeting guests as they

arrive).

- g. Prepares the Black Alumni Council President-elect to succeed her/him/them at the end of the term of office.
- h. Assumes the position of Immediate Past President when term ends.

President-Elect (two-year term of office; cannot serve consecutive terms)

- a. Must be an alumna/us of the College.
- b. Participates in a CofC Club & Affinity Group Leaders Training Conference at the earliest opportunity.
- c. Understudies and assists the President in fulfilling her/his/their responsibilities of the President.
- d. Registers for and attends Black Alumni Council events.
- e. Promotes making an annual donation to the College to Black Alumni Council members.
- f. Assumes the position of President when term ends.

Secretary (two-year term of office; cannot serve consecutive terms)

- a. Must be an alumna/us of the College.
- b. Participates in a CofC Club & Affinity Group Leaders Training Conference at the earliest opportunity.
- c. Takes attendance at Black Alumni Council leadership meetings, records minutes, and shares minutes with the Black Alumni Council leaders after each meeting.
- d. Promotes making an annual donation to the College to Black Alumni Council members and assists in recognizing donors through Black Alumni Council communications.

Treasurer (two-year term of office; cannot serve consecutive terms)

- a. Must be an alumna/us of the College.
- b. Participates in a CofC Club & Affinity Group Leaders Training Conference at the earliest opportunity.
- c. Reports financial standing at Black Alumni Council leadership meetings.
- d. Receives all requests for funds and reviews them with Alumni Affairs Associate Director of CofC Clubs and Affinity Groups Meredith Chance for liability and procedures prior to presenting the request to the BAC leadership. Once the expenditure is approved by the BAC leadership, Meredith will submit the request for payment to the Foundation Financial Management staff. Please see "Fiduciary Responsibilities and Liabilities" section below.
- e. Promotes making an annual donation to the College to Black Alumni Council members and assists in recognizing donors through Black Alumni Council communications.

Parliamentarian (two-year term of office; cannot serve consecutive terms)

- a. Must be an alumna/us of the College.
- b. Participates in a CofC Club & Affinity Group Leaders Training Conference at the earliest opportunity.
- c. Ensures "Rules of Order" are followed at Black Alumni Council leadership meetings. These rules, such as *Robert's Rules of Order Newly Revised*, enable the members to efficiently and fairly discuss and determine actions to be taken.

- d. Promotes making an annual donation to the College to Black Alumni Council members and assists in recognizing donors through Black Alumni Council communications.

Black Student Union Representative (two-year term of office; cannot serve consecutive terms)

- a. Must be a current student at the College.
- b. Participates in Black Alumni Council leadership meetings and assists leaders as needed.

Immediate Past President (two-year term of office; automatically assumed by the previous President)

- a. Serves as the senior advisor to the Black Alumni Council's leadership.
- b. Registers for and attends Black Alumni Council events.
- c. Promotes making an annual donation to the College to Black Alumni Council members and assists in recognizing donors at Black Alumni Council events (e.g., personally thanking them as guests arrive).
- d. Assists Black Alumni Council leaders as needed.

The Black Alumni Council may adopt different or additional leadership positions as needed with approval of the Alumni Association's Executive Committee. For example, to expand representation of the Black Alumni Council membership or if membership in the Black Alumni Council increases to a point that regional events and activities should be organized, a position for each region may be added.

V. Fiduciary Responsibilities and Liabilities

The Alumni Association assumes the financial risk and liability for Black Alumni Council events and activities, so advance approval is required before planning/announcing events and activities. The Alumni Affairs staff is charged with managing the Alumni Association's budget and insurance coverage. Only Alumni Affairs staff are authorized to sign contracts or to obligate the Alumni Association for expenses and activities. Affinity Groups may not set up separate financial accounts, charge dues, or solicit sponsorships. Fundraising activities (for example, for scholarships or programs) must be coordinated with Alumni Affairs staff in advance. Affinity Groups may not use "Go Fund Me" or other fundraising platforms. Requests for use of BAC funds are submitted to the BAC Treasurer, who reviews them with Alumni Affairs Associate Director of CofC Clubs and Affinity Groups Meredith Chance before presenting the request for approval by the BAC leadership. Once approved, Meredith will submit the request for payment to the Foundation Financial Management staff.

Alumni Affairs staff will arrange for direct payment from the Alumni Association for approved events, activities, and promotions. This ensures Black Alumni Council leaders are not expected to personally underwrite Black Alumni Council expenses or to be held personally liable for events and activities.

VI. Event Planning

At a minimum, Affinity Groups, including the Black Alumni Council, are required to coordinate activities and events around Spring and Fall Alumni Weekends and CofC Day each year. Other events (in-person or virtual) may be held in addition to these three annual events. While the Alumni Association does not charge dues, it does charge individuals for participation in events to cover costs. As long as approval is obtained from Alumni Affairs staff on event plans and budgets, the Alumni Association will bear the

financial and liability risk for events. The Alumni Affairs staff will assist with budgets, secure locations, negotiate contracts, establish ticket pricing, create online registration sites, promote events, collect ticket revenue, manage on site logistics, arrange security if needed, and pay invoices. Here are tried and true best practices for successful events:

- Draft a calendar of events for the entire year, rather than one event at a time.
- Work with Alumni Affairs staff as far in advance as possible to ensure optimal promotion.
- In most cases, events will be held on campus, therefore compliance with campus rules about alcohol and security is required.
- Supplies for events will be provided by Alumni Affairs (e.g., signage/banners, door prize items or giveaways, name tags, ribbons, printed materials).
- At the event, the Black Alumni Council President (or another Affinity Group leader) will welcome attendees and give brief remarks. Alumni Affairs will assist with suggested talking points.
- Black Alumni Council leaders must register/purchase tickets to events to attend, unless otherwise approved in advance by Alumni Affairs.

VII. Communications and Social Media Accounts

The Black Alumni Council leaders will work with Alumni Affairs staff on all communications regarding Black Alumni Council, including email, print, website, and social media messaging.

Database: The Alumni Affairs staff will manage Black Alumni Council memberships within the alumni contact database. Due to federal privacy laws, College policies, and liability concerns, the Alumni Affairs staff cannot provide Black Alumni Council contact lists to group leaders. The Alumni Affairs staff can provide aggregate demographic data for the Black Alumni Council and can send out surveys to Black Alumni Council members as needed.

Websites: Affinity Groups and/or events will be featured on the Alumni Association, Fall Alumni Weekend, and Spring Alumni Weekend websites. The Alumni Affairs staff will create and maintain event registration websites.

Social Media: Because social media carries significant liability for the Alumni Association and the College, Alumni Affairs staff will work closely with Black Alumni Council leaders to establish and manage social media accounts as needed, in compliance with the College's social media policy. Black Alumni Council leaders may not set up separate social media accounts for the Black Alumni Council.

Media Contacts: Only the President of the Alumni Association is authorized to speak on behalf of the Alumni Association. If you are contacted by a member of the media regarding the College, the Alumni Association, or an Affinity Group, please refer them to Ron Menchaca '98, Vice President of University Communications, at menchacar@cofc.edu or (843)953-3395. Mr. Menchaca will refer the media representative to the appropriate spokesperson(s).

VIII. Terms and Conditions for Affinity Groups

The Alumni Association reserves the right to suspend or dissolve an Affinity Group, or to remove an Affinity Group leader, for any of the following reasons:

- Failure to meet the Affinity Group criteria or to comply with the guidelines.
- Acting in a manner that is detrimental to the College or the Alumni Association.
- Unauthorized or improper use of the Alumni Association's name, non-profit status, etc.
- Maintaining a shadow database, unauthorized website, or social media account(s).
- Lack of interest in maintaining the Affinity Group by its leaders or members.

Withdrawal of recognition will be voted upon by the Alumni Association Executive Committee.

IX. Alumni Affairs Contact

The primary contact for Affinity Groups is Meredith Chance, Associate Director, Clubs and Affinity Groups, at chancem@cofc.edu or 843-953-6631. Ms. Chance will work directly with her colleagues and Alumni Association Executive Committee leaders as needed.