



**BRADLEY**  
University

# AFFINITY GROUP GUIDEBOOK

BRADLEY UNIVERSITY ALUMNI ASSOCIATION



## Alumni Association Affinity Group Guide

### WELCOME!

---

The Bradley University Alumni Association connects all Bradley alumni through regional chapters, affinity groups, special events, alumni publications, social media and more. The BUAA encourages alumni to develop and maintain a lifelong relationship with the university and with each other. Strong affinity groups that promote the university are at the core of the BUAA and Bradley's success. This document will be your guide to all areas of creating and managing an affinity through the Bradley University Alumni Association.

### TABLE OF CONTENTS

#### **Affinity Group 101 – Pg. 2**

- Why Affinity Groups and what do they do?
- Expectations to consider before starting an affinity group
- Leadership Tips for Affinity Groups

#### **Support provided by the Bradley Alumni Association – Pg. 3**

#### **Starting an affinity group – Pg. 3**

- Is it possible?
- The Process

#### **Affinity Group Policies and Guidelines – Pg. 4**

- Structure
- Email Requests
- Data Protection
- Mailing requests
- Contracts and Agreements
- Use of the Bradley University Logos
- Social Media
- Events
- Annual Review
- Financial Policies
- Scholarships

#### **Event Planning Guide – Pg. 5**

#### **Contact Information – Pg. 6**

- Staff and University directory
- Current BUAA affinity group directory

### Why Affinity Groups and what do they do?

Alumni affinity groups bring active alumni together for the common purpose of encouraging participation and connection with the BUAA and the university as a whole. Affinity groups are a means through which individuals can contribute their talents to the objectives and mission of Bradley University. Alumni affinity groups are imperative to engaging alumni around the world and serve as resources to keep them involved after graduation. As such, alumni chapters and affinity groups strive to do the following:

- Actively recruit new members year-round
- Provide a means to connect alumni to the university and to each other
- Create and promote programming for alumni to attend
- Support and advocate all other programs and initiatives involving the Bradley University Alumni Association, including homecoming and regional events.
- Maintain a succession plan to assure continuity in group leadership.
- Endorse fundraising campaigns in support of Bradley University.
- Assist alumni in keeping their information up-to-date by notifying the Office of Alumni Relations of member contact information changes.

### Expectations to consider before starting an affinity group

The Alumni Association sets forth the following expectations for Bradley University alumni affinity groups:

- Each alumni affinity group will maintain its own board and committee structure consisting of at least a:
  - President:** The leader of the group and primary liaison to the alumni association, Office of Alumni Relations and alumni.
  - Events Coordinator:** Works with the Office of Alumni Relations liaison and group leadership to host and market both on and off campus events.
  - Communications Coordinator:** Spearheads promotion efforts in conjunction with the Office of Alumni Relations liaison.
- The group should maintain an active alumni roster of 15 members.
- Affinity group leaders will host an annual planning session to sketch an outline of upcoming events during the coming calendar year.
- Cultivate a pool of alumni volunteers interested in becoming future affinity group leaders.
- Maintain good communication not only with the group members and leaders but also with the Office of Alumni Relations liaison.

- Submit nominations for the annual Alumni Awards through the Office of Alumni Relations
- Adhere to all Office of Alumni Relations timelines for event planning and communications
- Promote and support all university giving campaigns throughout the year
- Complete a yearly review questionnaire supplied by the Office of Alumni Relations

### Leadership Tips for Affinity Groups

Strong leadership is the key to a successful affinity group. To ensure your leadership team is the best it can be, here are a few tools and tips you can use:

- Establish a clear mission and vision for your group before anything else. Having something to work towards will help guide everything you do as a group.
- Balance your communications between in-person, over-the-phone and electronic. Email is an effective communication tool, but it's not a replacement for the occasional in-person or video conference, which helps volunteers reaffirm their commitment to the group.
- Encourage open dialogue about how involved each leader wants to be. No two alumni have the same amount of time to give, so make sure you're having open conversations as a leadership team about who has the time and interest to do what.
- Constantly recruit new volunteers and leaders!. Every event you host is an opportunity to talk about being a leader and to offer new alumni a chance to get involved and make the group better.
- Utilize resources in the Office of Alumni Relations. The staff is always available to discuss ways to increase engagement and participation.
- Talk with other leaders. Every group has something it can learn from another affinity group, so make the most of network opportunities such as regular conference calls and reaching out to leaders directly. A list of current BUAA Affinity Group leaders is available under the current BUAA affinity group directory of this document.
- Start by asking alumni to volunteer for a single project or event. Committing to being a board member or a committee chair can sound daunting, but helping with an event or Facebook page is a defined and manageable commitment. Once a new volunteer's project is complete, ask them to help with another. Be sure to thank them along the way!

## SUPPORT PROVIDED BY THE BRADLEY ALUMNI ASSOCIATION

---

Affinity Groups can expect the following from the Office of Alumni Relations:

- A dedicated staff member within the Alumni Relations team who will aid in group/event development, implementation, and evaluation while attending key meetings.
  - Marketing and communications support including: writing emails, newsletters, calendar listings, in-house graphic design, social media and event websites.
  - A digital media kit to help you use the correct Bradley logos, fonts and colors, as well as backgrounds to use for any online meetings/events.
  - Assistance in hosting events by Office of Alumni Relations staff
  - Event kits, including name tags, giveaways, brochures and other information by request if a team member is not going to be attending the event.
  - Support and guidance for getting organized, planning meetings and growing membership
- Event coordination support including but not limited to: Registration platform and Fee Collection Services  
Contract/payments submission with the university  
Post-event survey and follow-up with the chapter  
Giveaways  
See full event planner on page 5.
  - Access to Hayden-Clark Alumni Center meeting and conference rooms.
  - A conference call line
  - Bradley bank account to collect fees
  - Branded table cloth
  - Bradley University Nametags for Executive Board members
  - Access to development officers for fundraising guidance on goals and campaigns
  - Creation and maintenance of an affinity group webpage
  - Access to requested alumni information, as approved by the Vice President of Advancement (See data protection policy on page 4)

## STEPS TO STARTING AN AFFINITY GROUP

---

### Is it possible?

- **Time:** Many factors must be considered when starting a Bradley University Affinity Group. First, time commitments. While an affinity group leader is a volunteer position, 2-3 hour a week should be set aside to manage group activities and keep the group active. Having a strong leadership team will help disperse the workload and keep everyone happy. The Office of Alumni Relations liaison will rely on the group leadership team to keep the group up and running.
- **Available Members:** Before starting an affinity group, prospective group leaders will meet with the Office of Alumni Relations staff and examine Bradley University alumni data to determine if an appropriate number of alumni who fit into the prospective affinity group target market exist. If numbers are not strong enough, other options may be explored at that time.
- **Succession Plans:** All affinity groups will be required to submit and maintain a yearly succession plan of leadership to ensure continuity of the group in the future.
- **Events:** An initial slate of events should also be sketched out during the early stages of group planning in order to attract new members and prospective future leaders.

### The Process

Once all points have been considered, the following steps may be taken towards starting a Bradley University Affinity Group:

- Initial request for information  
Contact the Bradley University Office of Alumni Relations to schedule an initial information meeting. Alumni data examination will take place during this meeting.
- Submission of required documents/roster  
Affinity Group charter, membership lists and Executive board roster will be submitted to the Bradley University Alumni Association Board for approval.
- Bradley University Alumni Association Board of Directors votes to approve group charter application
- Orientation  
If the BUAA Board grants a charter, affinity group leadership will meet again with the Office of Alumni Relations staff to complete an orientation and begin to plan for the group launch.
- Launch  
The new affinity group will be added to the Office of Alumni Relations website and appropriate communication will be sent out in promotion of the group.

### Structure

Alumni groups must be related to a specific identity, student organization, college, or department of the University, and have a faculty or staff sponsor.

Groups must submit a charter document defining the group and its mission.

Groups must have an executive board of at least five members and a total membership of 15 or more alumni to be recognized.

The affinity group executive team will set the course for the group. They will work closely with the Office of Alumni Relations liaison and the BUAA Board to promote the strategic objectives of the university and the group.

An Alumni Relations representative will serve as an ex-officio member of the group's board and act as a staff liaison.

These alumni groups will be financially self-supporting.

### Email Request Policy

The Office of Alumni Relations protects alumni contact information and cannot legally share private information. Therefore, all outgoing mass emails to alumni must be sent through our office. The Office of Alumni Relations reserves the right to ensure that outgoing messages representing the university are brand compliant and appropriately planned with respect to other campus email communications.

### Data Protection Policy

In order to ensure the privacy of Bradley University graduates, only authorized agents of the University are allowed by the Advancement Office to receive alumni information. In order to receive data, an Alumni Data Request Form must be submitted to the Vice President for University Advancement with an appropriate rationale for need. Those granted any data bear a responsibility in ensuring the stewardship of alumni records by handling the records in a professional manner. Authorized agents of the University shall not use the alumni information for anything other than the one-time approved purpose or intent stated in the Alumni Data Request Form. Data request forms are available through the Office of Alumni Relations liaison.

### Mailing Requests

Due to their high cost, physical mailers are generally reserved for special occasions such as Presidential events and expectations should be discussed with the Office of Alumni Relations liaison.

### Contracts and Agreements

Any and all signed agreements/contracts entered into by an affinity group as an extension of Bradley University must be completed and signed by a member of the Office of Alumni Relations. Any agreement not signed by the Office of Alumni Relations will not be honored.

### Use of the Bradley University Logos

The university logo is the strongest link to our brand. That is why it is important to use only approved logos in all communications. Please refer to the University Marketing and Communications branding policies for all questions. Because

of the importance of this, the Office of Alumni Relations requires that affinity groups allow an Alumni Relations staff member administrator privileges on all social media pages and websites, to ensure that the logo is being used in compliance with the university brand standards.

### Social Media

The Office of Alumni Relations asks that each affinity group maintain at least a Facebook page in partnership with the Office of Alumni Relations staff liaison. We will start the page for you to ensure it meets our university standards and grant access to group leaders. As mentioned above, the Office of Alumni Relations requires that affinity groups allow an Alumni Relations staff member administrator privileges on all social media pages at all times. Violation of this policy can result in the group's charter being revoked by the BUAA Board of Directors.

If an affinity group desires to utilize more social media platforms than just Facebook, a conversation must be had with the Alumni Relations representative about proper usage and differentiation of content before a page is created.

### Events

The Office of Alumni Relations must be notified a minimum of eight weeks prior to an event to allow adequate time for preparation, website building and proper promotion. Please indicate if an event kit and/or marketing materials will be needed during this time also.

After an event is complete, please provide the Office of Alumni Relations with photos of your event so that we can brag about you on our social media channels!

A full event planning guide is available as Appendix A

### Annual Review

Affinity group leaders will be required to submit a yearly evaluation of the group's activity and events. The evaluation will not be used as an annual determination of the groups charter worthiness but as a way for the Office of Alumni Relations to determine where more resources or time may be needed to ensure the groups success. The evaluation will be administered online by the Office of Alumni Relations liaison near the end of each calendar year.

### Financial

As an official Bradley University Affinity Group, you are tax exempt for purchases. Because of this, the Office of Alumni Relations requires all purchases using affinity group funds be processed through the Office of Alumni Relations to ensure proper processing. Contact your Office of Alumni Relations staff liaison for help in processing a purchase.

### Scholarships

The Office of Alumni Relations recognizes the desire for affinity groups to create and administer a yearly scholarship to students who fit within the group target market. However, the creation of an endowed scholarship requires a significant investment by alumni and a number of very stringent governmental rules and regulations to consider first. The Office of Alumni Relations recommends that a group first establish themselves properly before looking into the creation of a scholarship.

## EVENT PLANNING CHECKLIST

---

The Bradley family is a significant part of each alum's life experience. We love helping alumni plan and celebrate events that bring that family together. We've found events go better and are more well attended when organizers take some steps early on, when planning and organizing, as well as later when it comes time for the event.

Read through this guide so you know what to think about, what to do and when. Then call or email us to talk about your ideas. Every event is different. Together we'll come up with a plan to make the one you've got in mind the best it can be.

### Three Months in Advance:

- Choose someone to be in charge of your event and someone who will be a point of contact (this may be the same person)
- Develop a project plan: Who is your audience? How many do you want to attend? Consider how much time is available to organize your event
- Select a date and time that suits the event. Be mindful of religious and government holidays when choosing your date
- Research venue options and visit prospective sites
  - Find out if you will be required to use the venue's catering service or if you can bring in food from another caterer
  - Consider food and drink options you'll offer. Will there be a buffet? A plated dinner? A sandwich platter? Snacks and hors d'oeuvres?
  - Make sure the venue can accommodate your setup. Do you need lecture-style seating? Room to mingle with stand-up tables? Or large round tables where people can sit and eat?
  - Be sure to understand the venue's timeline when it comes to reservations, final head counts, and when you can access the space on the day of your event. Their requirements may be different from Bradley's
- Consider your A/V needs
  - Projector
  - Microphone
  - Laptop connection
  - Music
  - Other
- Research logistics such as parking and accessibility
- Create an event budget to determine if an admission fee is needed to cover costs
- Notify Bradley Alumni Relations with your plans so we can begin to build the event website, compile invitee lists and create a promotion schedule
- Once you've settled on a venue and secured a contract, send it to the Alumni Relations person you've been working with. Remember, a BU staffer must approve, sign and pay for all contracts

### One to Two Months in Advance:

- Bradley's Alumni Relations office will send an email invitation based on criteria you provide, such as group membership, class year, geographic location, etc. We'll track RSVPs and share event information on our social media channels when appropriate
- Start recruiting volunteers to help at the event, if needed (for instance, staffing the greeting and sign-in table, giving directions, decorating, or cleanup)
- Monitor RSVPs and get the most current headcount to your venue and caterer as needed

### One to Three Weeks in Advance:

- Finalize your catering menu
- Order and confirm all A/V equipment and finalize room set-up with your venue
- Alumni Relations will send a reminder email to those who have no RSVPd
- If there aren't as many RSVPs as you'd hoped, call alumni from the group and personally invite them
- Check how many have registered and get that final estimate to the venue and caterer
- Alumni Relations can print name tags and mail them to you; if one of our staff will be attending the event, we'll bring printed name tags with us

### Day of Event:

- Arrive early (30 to 60 minutes before the start of the event)
- Set up a registration area with nametags and place directional and event signs
- Check in attendees as they arrive; record names of people who didn't pre-register
- Ask attendees to fill out a raffle prize slip (if applicable)
- Take photos throughout the event, both posed and casual, and send them to Alumni Relations. We will use them for future promotions and may post on websites and social media to show alumni some of the great things going on out there

### Post-Event:

- Send the final attendance list to Alumni Relations for processing. Include anyone who "walked in" to the event without pre-registering.
- Send a personal thank you to your volunteers and event committee members

## STAFF CONTACTS:

### Jacob Heuser

Vice President for Advancement  
Hayden-Clark Alumni Center 220F  
(309) 677-3160

### Tory McCord Jennetten '96

Executive Director of Alumni  
Relations  
Hayden-Clark Alumni Center 220E  
(309) 677-2864  
tory@bradley.edu

### Joshua Cox '09

Associate Director of Alumni  
Relations  
Hayden-Clark Alumni Center 220D  
(309) 677-4778  
jwcox@bradley.edu

### Ann Warren

Assistant Director of Advancement  
Communications  
Hayden-Clark Alumni Center 220C  
(309) 677-2259  
awarren2@bradley.edu

### Lisa Faulkner Hatfield

Administrative Support, Alumni  
Relations  
Hayden-Clark Alumni Center  
(309) 677-2240  
ldfaulkner@bradley.edu

### Amie Love

Administrative Support, Alumni  
Relations  
Hayden-Clark Alumni Center  
(309) 677-2246  
amlove@bradley.edu

## AFFINITY GROUP CONTACTS

All of our affinity group presidents are willing to help you think through the process of creating and managing an affinity group. Please feel free to reach out to them at any time with questions you might have.

### Bradley University Black Alumni Alliance (BUBAA)

Tracy Walker '99  
acharmingsigma@gmail.com

### Bradley Association of International Latino Alumni (BAILA)

Adrian Alvarez '89  
Amalvarez@att.com

### Bradley University Jewish Alumni Network (BUJAN)

Daniel Shore '09  
danielshore86@gmail.com

### Executive Master of Business Administration (EMBA)

Elly Peterson '11  
(309) 677-2612  
eepeterson@fsmail.bradley.edu