

ALUMNI ASSOCIATION GUIDE



PEP FOUNDATION

BY PEP FOUNDATION



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PURPOSE OF THIS GUIDE

This guide is designed to help universities create their own alumni associations from the ground and make existing alumni associations efficient. A visionary, strategic and engaged Alumni Association will help universities promote and progress their goals, foster a spirit of loyalty among their students and help advance the general welfare of universities.



1

IMPORTANCE OF ALUMNI ASSOCIATION



WHY IS AN ALUMNI ASSOCIATION IMPORTANT?

Maintaining good relations with the alumni is inevitable for the success of a higher education institution's overall mission and vision. Alumni serve many valuable roles; most importantly helping higher education create and expand its brand value. Without an alumni association, the prospect pool of fundraisers and donors will be small. Alumni are potentially loyal and generous supporters of the university if managed and engaged strategically.

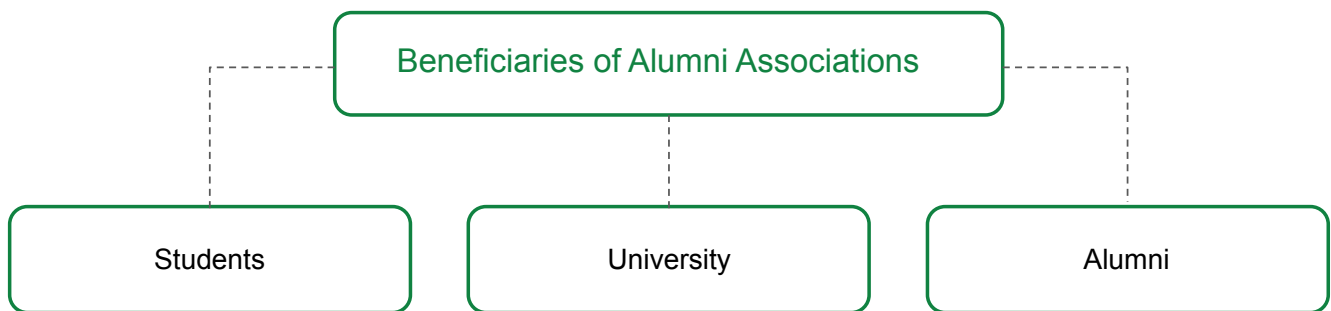


FIGURE 1.1

BENEFITS TO THE STUDENT BODY

- Alumni Association provides networking opportunities. Students can connect with established professionals from their university alumni to seek help with their career goals.
- Alumni associations can provide services to university students through their skills and experience. These include mentoring/advising, academic support, and capacity-building programs.
- Alumni who want to give back to their community and institute can support students with financial assistance such as donations and scholarships.
- Alumni can encourage existing students to become prospective alumni, by participating and volunteering in different events organized by the association.
- Students who are active members of the alumni council or clubs develop useful social and managerial skills that can help them later in their professional lives.

-
- Successful graduates are a university's best asset; the Alumni association provides substantial fundraising prospects to the institute.
 - Alumni generate invaluable word-of-mouth marketing for the university among their social and professional networks, thus helping raise the profile of the university.
 - Alumni are the international and national ambassadors of the university who can help the university to develop linkages with key stakeholders
 - Alumni can lend critical technical input to help improve and revamp the course curriculum and pedagogies at the institute.

BENEFITS TO THE ALUMNI

- It creates a sense of belonging among the alumni towards their university, resulting in the creation of a lifelong community.
- It creates a sense of recognition when a university appreciates and recognizes the contribution and success stories of its alumni.
- It increases the networking opportunities for the alumni by connecting them with other successful professionals from their alma mater.
- Alumni can get free access to university infrastructures, like libraries, research labs, and business incubators.
- Alumni associations can offer a number of career-building services to the alumni to help them advance in their career paths.

2

STRUCTURE OF AN ALUMNI ASSOCIATION



WHAT IS AN ALUMNI ASSOCIATION?

An Alumni Association is a department or unit in a higher education institute that serves as a connecting link between the alumni and the institute. It strengthens ties among the alumni, as well as between alumni and alma mater, providing opportunities for cooperation and communication to ensure a long-lasting relationship with the student body in line with the institute's goals, values, and interests.

STEPS OF BUILDING AN ALUMNI ASSOCIATION



FIGURE 2.1

STEP 1 — BOARD OF DIRECTORS

The initial step is to create a Board of Directors. It is the governing body that is mainly responsible for the structure and executive policies of the alumni association. Committee members are also known as officers.

A few primary responsibilities of the committee would include:

- Outline the main purpose, goals, and objectives of the alumni association
- Recruit a team and set up a governance structure
- Create and curate the bylaws for the alumni association
- Annual budgeting and finance allocation
- Ensure the university's vision and goals are aligned with the Alumni Association
- Recognize annual achievements and progress
- Revise annual strategies, plan new targets and set new milestones
- Identify and discuss barriers and opportunities
- Curate the Alumni Association constitution and policy framework, and publish it on the University's website

Members of the Board of Directors & their Basic Responsibilities would include:

- Vice-Chancellor/ Rector/President:
 - Is the principal officer of the Association and presides over all meetings of the Board of Directors and general meetings of the Association.
 - Will authorize official Executive Council reports/publications with the assistance of the Secretary
 - Will authorize the elected and non-elected officers of the Alumni Association
 - May attend regional and international Alumni events, meetings, and gatherings.
 - May invite guest speakers to Alumni Association events and meetings

- Vice-President:
 - Collaborates with the leaders and registrar's office of the University
 - Ensures that the Alumni Association is functioning within the confines of the constitution and bylaws
 - Ensures that the Association moves steadily towards the objectives laid out in the Alumni Association constitution, and towards any new endeavors identified by the General Body / Executive Council
 - Determines and implements the specifics of the Annual Association Meeting, in consultation with other committee members
 - Ensures that the Executive Council functions as a cohesive unit
 - In the absence of the President, Vice-President will authorize official Executive Council reports/publications with the assistance of the Secretary
 - Must attend or even host all the national and international Alumni events

- Secretary:

The Secretary is responsible for the following items:

 - Maintains all Alumni administrative and membership records
 - Arranges all Alumni council meetings, records and circulates meeting minutes
 - Maintains a record of minutes/reports from standing and ad-hoc committees
 - Ensures conduction of the meetings according to Alumni Association bylaws
 - Maintains membership database and liaises with the Alumni Association and registrar's office at the university to ensure accuracy of the database
 - Creates and maintains Alumni Association documentation as required
 - Assists the President with logistics of the Annual Alumni Meeting
 - Establishes and monitors timelines for tasks/projects undertaken by Alumni Association

- Treasurer:

The Treasurer is responsible for managing all the monetary aspects of the association including membership dues, donations, proceeds from sponsors, and all other funds required to support alumni activities: More specifically, the Treasurer:

- Maintains and monitors bank accounts and transactions, including withdrawal or deposit of funds
- Will prepare and submit annual Federal and National taxes and paperwork, as required by the regulations
- Will prepare and submit an annual financial report to the Board of Directors and Alumni Council
- May preside over a Financial Committee or/and an Asset Management Committee formed by the Executive Council to make recommendations for investment and management of these and other long-term assets.

- Legal/Compliance Officer:

- He/She will have legal & compliance expertise and will be responsible to record, curate, and maintaining all the bylaws, Policy Framework, and Alumni Association Constitution
- Will Actively participate in all the meetings and make adjustments where required
- Will submit all proposed policies and bylaws to the President and Vice-President for approval
- Will represent and counsel the Alumni Association on legal matters at both national and international levels
- Will curate all the legal matters of the Board of Directors, Alumni Council, Alumni Membership, Alumni Chapters, etc.

STEP 2 — EXECUTIVE COUNCIL/BODY

The Alumni Council is the executive body of the Association. It consists of the following personnel:

Director of the Advancement Office:

He/she will be representing the Advancement Office: Alumni Relations (one of the functional areas of the AO) and will act as the liaison between the Alumni Association and the potential donors. Other responsibilities include:

- Developing and overseeing fundraising strategies, fundraising plans, and donor relationships, including donor recognition and stewardship
- Presenting to the Board of Trustees an annual development plan for achieving specific goals of the Alumni Association
- Leading the strategic direction and operations of the Alumni Relations Office, including program outcomes, volunteer relations, budget, and personnel.

General Manager of Alumni Office/Alumni Relations Officer:

- Develops, coordinates, and evaluates programs and projects to promote alumni relations and educational programs designed to connect alumni through academic channels such as programs/departments/schools/colleges.
- Plans, coordinates, and attends alumni events, meetings, or other activities as requested by academic units.
- Identifies, cultivates, and stewards alumni and volunteers. Helps current volunteer leadership to identify potential new volunteers and future leadership.
- Coordinates and produces reports, proposals, and analyses for management, including monthly budgets, periodic data collection and analysis reports, and post-event reports and recommendations.
- Directs Assistant Manager Alumni Data Base Management, Assistant Manager Alumni Networking and Engagement, and Assistant Manager Alumni Financing
- Develops, sustains, and strengthens alumni chapters that focus on establishing and maintaining connections among alumni.
- Represents the organization at various community and/or business meetings, committees, and task forces; promotes existing and new programs and/or policies.
- Serves on committees relating to alumni relations, and serves as a liaison between Alumni Association and the community.
- Works closely with the Heads of Departments that have frequent contact with alumni, especially the International Office and Careers Advisory Service, to develop and implement strategies for alumni outreach and engagement.

Assistant Manager Alumni Data Base Management:

- Reporting directly to General Manager of Alumni Association
- Maintaining the Database of the Alumni and Alumni segmentation
- Responsible for consolidation of university student database under the Alumni office
- Managing Alumni CRM (Customer Relationship Management) Software
- Managing technical requirements such as web maintenance, alumni mobile app maintenance, CRM software maintenance, and up-gradation.
- Maintaining statistical and data management reports for forecasting and strategy development

Assistant Manager Alumni Networking and Engagement:

- Reporting directly to General Manager of Alumni Association
- Will work closely with the Advancement Office
- Responsible for organizing and strategizing linkages with different stakeholders
- Manages internal office engagement tasks and requirements
- Direct engagement with the alumni; overseeing of engagement tools
- Coordination with Alumni Chapters
- Outreach/ funding campaigns in collaboration with Alumni
- Manages University's alumni portals and/or social media pages.
- Strategizing engagement plans and activities according to the stats and analysis provided by Alumni Data Management and segmentation team.

Assistant Manager Alumni Financing:

- Reporting directly to General Manager of Alumni Association
- Makes annual and bi-annual financial reports
- Develops strategies and suggests ways to increase revenue collection from alumni activities
- Create a transparent and accountable financial analysis for respective stakeholders of the alumni association

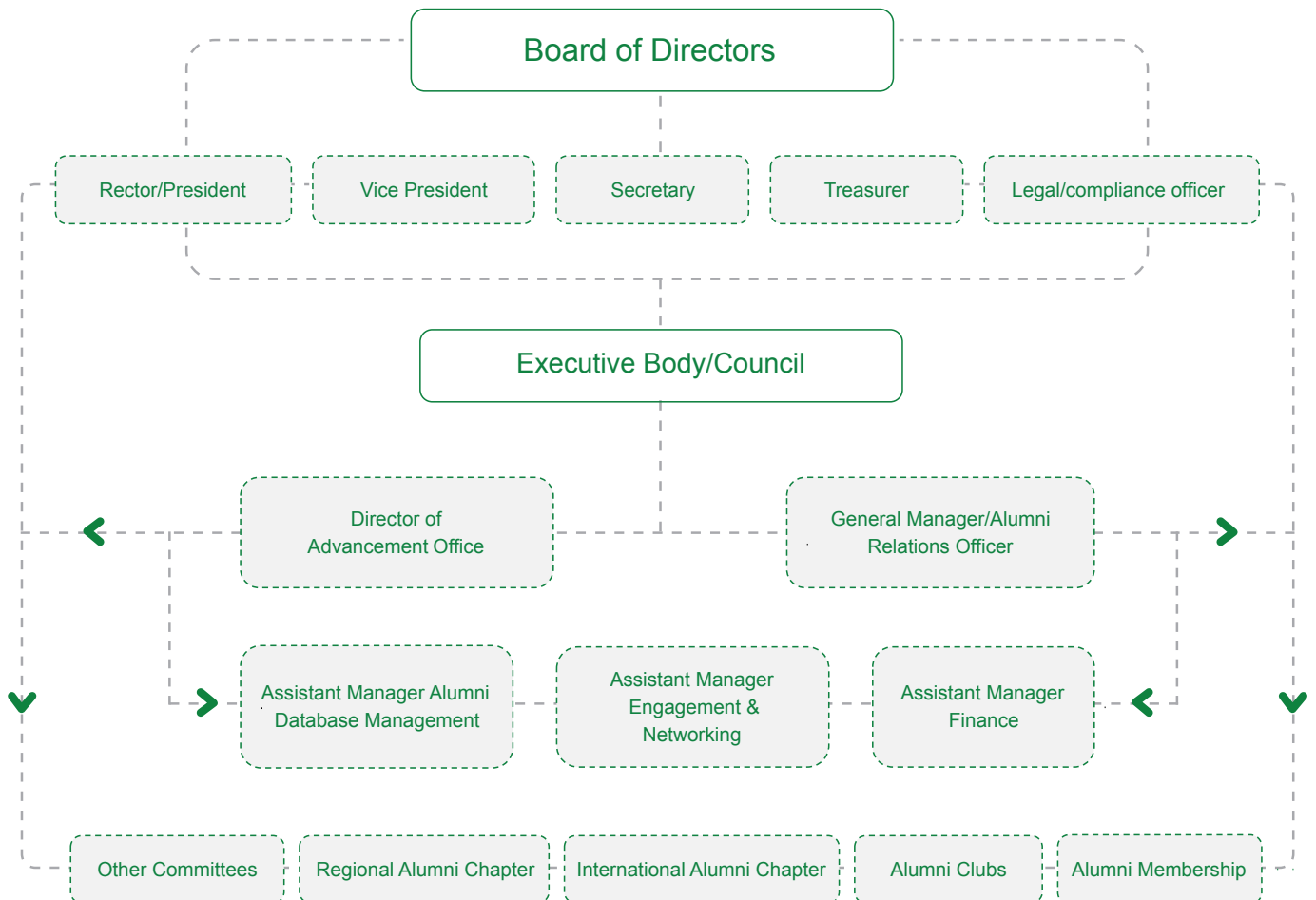


FIGURE 2.2 - ALUMNI ASSOCIATION: ORGANIZATIONAL STRUCTURE

STEP 3 — ESTABLISHING ALUMNI OFFICE

The Executive Council is responsible for establishing and managing the alumni office with the required expertise & human resources. The office is mainly responsible for gathering and managing the alumni database, strategizing effective means to develop networking and engagement with the alumni, as well as formulating ways to strengthen relations with alumni, friends, and family.

Why Alumni Office should work in coordination with the University's Advancement Office?

The Advancement Office is basically responsible for managing strategic relationships with key constituents such as donors, policymakers, members of social communities, as well as alumni, and friends. It raises the profile and awareness of the university to develop and create a successful brand image. One of the functional areas of the Advancement Office is Alumni Relations.

- It acts as a liaison between the university and the alumni association
- It provides prospective donors and funds to the alumni association
- It helps target potential alumni as donors, community builders, and professionals.
- It supports strengthening robust and engaged alumni relations and corporate linkages
- It contributes to a high-performing alumni relations office, as they share mutual interests and goals.
- The Advancement Office also coordinates with the Alumni chapters that the alumni association has formed at the instructions of the Alumni Board or the request of the chapter members.
- Lead the strategic direction and operations of the Alumni Relations Office, including, program, volunteer relations, budget, and personnel.
- Presents alumni relations development strategies, budgets, and reports to the Board of Directors.
- Supports General and Assistant Managers in alumni affairs.

For potential outreach, engagement, management, financing, and networking of the Alumni Office, it's recommended that the Alumni office must work in coordination with the Advancement Office.

Alumni Association as a 'Centralized' System

Alumni relations efforts across campus (i.e., within the university, with the career services, admission office, student programming, and athletics offices, etc.) are often weak or non-existent; the high-performing alumni relations office works "centrally" to help elevate the broader institutional alumni engagement efforts in a collaborative manner while sharing budgetary, marketing, and programming resources. It ought to be an autonomous body that works in a centralized environment under the jurisdiction of the Advancement Office in a university.

Scope of work of the Alumni Office:

For effective management, distribution, and execution of the tasks, alumni office should divide its work into three distinct areas:

1. Alumni Management: Deals with managing and maintaining the alumni database
2. Alumni Networking and Engagement: Deals with strengthening alumni relations
3. Alumni Financing: Deals with generating funds and strategizing cost-effective ways to manage alumni association expenses.

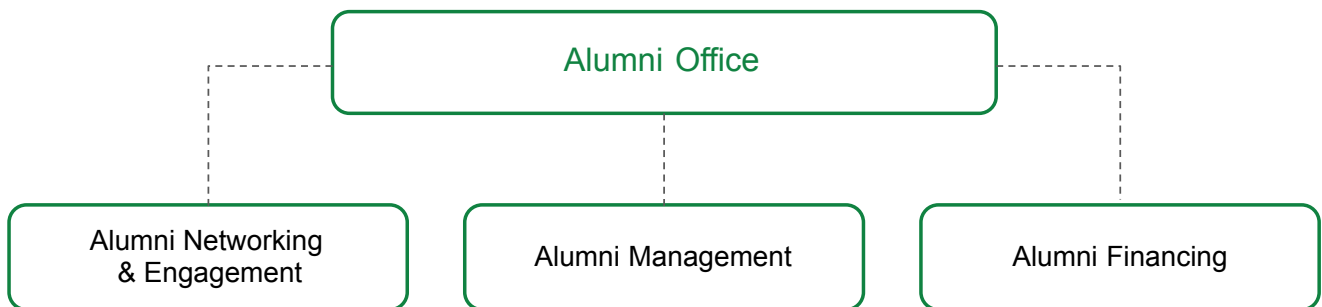


FIGURE 2.3

STEP 4 — ALUMNI ASSOCIATION BYLAWS & CONSTITUTION:

Bylaws and constitution form another significant pillar required to regulate the Alumni Association. The constitution contains the fundamental principles which govern the operations of the Alumni Association. The bylaws establish the specific rules of guidance by which the Alumni Association is to function. It will also help construct policy frameworks for the association.

A basic bylaws document must include the following:

1. Official name of the Alumni Association (E.g., Alumni Association of XYZ University)
2. Defined purpose, mission, vision, and goals of the Alumni Association
3. Defined rules and policies of Alumni Association membership
4. Eligibility, roles, duties, and tenure of the Board of Directors
5. Executive team; duties, role, tenure, and hierarchy
6. Alumni Association council and chapters; duties and functions
7. Other standing and regular committees roles, assigned members, and framework
8. Meetings and programs; general timing and frequency of the meetings
9. Funds management and allocation
10. Scholarship and fellowship funds, control, and operation
11. Communication channels: types and frequency
12. Major activities and work projects; chapter assistance, social functions, traditionally-sponsored events

Consult the attachment as a [sample of the Alumni Association Bylaws](#).

Regular or standing committees (e.g, Board of Directors Committee or finance committee, etc), alumni chapters & clubs will have their own defined bylaws.

STEP 5 — OTHER COMMITTEES

The Alumni Council is the elected leadership of the University Alumni Association and accomplishes its work through several committees:

- **Nominating Committee:** The Nominating Committee is responsible for identifying candidates for election to the Board under provisions outlined earlier. It shall consist of at least five members, including at least one officer of the Board.
- **Event Committee:** The Event Committee shall be responsible for planning alumni events, e.g Annual Dinner and other University-sponsored events as deemed necessary by the University.
- **Alumni Network Committee:** The Alumni Network Committee shall recruit and assist community alumni networking committees in developing off-campus alumni activities and networking events.
- **Awards Committee:** The Awards Committee is responsible for determining the recipients of awards given out by the Alumni Association,
- **Governance Committee:** Works on issues relating to the governance, operations and compliance of the Alumni Council and its committees.
- **International Committee:** Serves as a liaison to chapters, organizations, and individuals serving alumni outside of Pakistan and works closely with the global programming efforts of the Office of Alumni Engagement.
- **Regional Committee:** The Regional Committees build connections among alumni across the country. The Committee plan and organize gatherings to increase alumni engagement and affinity.
- **Alumni Network Committee:** The Alumni Network Committee shall recruit and assist community alumni networking committees in developing off-campus alumni activities and networking events.

STEP 6 — ALUMNI ASSOCIATION MEMBERSHIP

Who is an Alumni Member?

The Alumni Association constitution defines alumni membership as follows:

- **Full-Members:**
Full membership is for anyone who has graduated with a full-time degree or a diploma program (alumni).

Non-alumni Member Categories

- Honorary Members: Are determined by the Board of Directors to have rendered outstanding service to the Association or the Institute and are then elected Honorary Members by the Board of Directors.
- Associate Members: Associate membership is designated for those individuals who did not attend the university, but have an interest in advancing the goals of the University through the Alumni Association. They make regular payments or donations to the Alumni Association.
- Student Members: Membership is eligible for anyone who is enrolled in a full-time degree or a diploma program.

The Alumni Association membership welcomes not only the alumni but also friends and supporters to take part in its activities.

These might include:

- partners and family of alumni
- staff and former staff of the University
- parents of current students
- visiting academics and scholars

Rights and Privileges of Alumni Association Members:

All members in good standing shall possess the following rights and privileges:

- To vote in elections of the Alumni Association on matters affecting the Alumni Association
- To speak, make petitions and suggestions at any meeting of the Alumni Association
- To propose and advocate activities that promote the interests of the Alumni Association membership
- To participate in any Alumni Association events and learning programs.

Volunteer Opportunities

Alumni Association also provides volunteer opportunities to both volunteers graduate and non-graduates.

- Will serve to strengthen alumni engagement.
- Help shape the Alumni Association by leading or participating in administrative or subject-specific discussion groups.
- Share their expertise by presenting at a workshop, teaching a course, observing a volunteer group meeting, or participating in roundtable discussions about future standards.

Alumni Membership models

1. The Membership Dues Model:

Alumni choose to pay annual or life membership dues in exchange for a set of benefits and privileges not available to non-members.

- Generates revenue in the form of dues.
- Life dues can be placed into endowments
- Helps identify who is more active than a passive supporter

This membership model is ideal for those who can potentially pay membership fees.

2. The Inclusive Model:

All alumni have equal access to the same set of programs and services provided by their alma mater via the alumni office. All alumni automatically are welcome to participate in activities without regard to having actively joined an association or other alumni organization.

- Saves on the overhead of marketing and administering a separate membership and benefits program.
- Reduced marketing and sales aspects to alumni relations.
- Helps creates the impression that the association has something of relevance to all alumni.

This membership model is ideal for those who aren't financially strong or at a stable financial career e.g students or young graduates.

3. The Donor Benefits Model:

Individuals (including non-alumni) who donate at least a specified amount of money to the institution receive exclusive benefits for their contribution.

- Helps identify prospective donors
- Allows you to identify, cultivate, steward, and reward those who support the institution financially.

This membership model is ideal for potential donors e.g who only wish to pay zakat funds to the institution, etc.

ALUMNI CHAPTERS & CLUBS

WHAT IS AN ALUMNI CHAPTER & CLUB?

An alumni chapter or a club is a group of university alumni who share a common interest and have decided to formalize their interactions with each other.

Alumni chapters help bring alumni together by organizing activities or events centered around either the program they have followed, their geographical location, or their professional interests. Alumni Chapters & clubs are initiated by alumni volunteers. They are responsible for determining and streamlining the goals/vision of their chapter in close alignment with the Alumni Relations Officer.

WHY BUILD AN ALUMNI CHAPTER?

An alumni chapter can be helpful in many ways. It can provide networking and professional development opportunities for both students and alumni. It can bring on board prospective donors from different regions and industries. It allows the alumni to serve as ambassadors of their respective institutions and engage in different social activities according to their interests.

STEPS TO CREATE AN ALUMNI CHAPTER

STEP 1 — CONTACT YOUR FRIENDS AND THEIR CIRCLES

Get in touch with 10-15 alumni you know through business or personal contacts who are interested in providing volunteer leadership for the chapter. Members of the advisory committee will serve as the chapter officers until formal elections can take place the following cycle. The role of the committee is to:

1. Generate chapter interest and membership
2. Set the vision and direction for the chapter
3. Nominate volunteers to serve as officers and committee chairs
4. Plan the initial programs
5. Complete the necessary paperwork to officially kickstart the chapter

Alumni Relations Officer will act in the advisory role and be the liaison between the chapter and the university's Alumni Association and will ensure the processes are aligned with the mutual interests of both the alumni and the institution.

STEP 2 — FINALIZE CHAPTER MISSION AND GOALS

Each new volunteer leader would commit to being actively involved as a board member for one year and lay the foundation for the new chapter (e.g. the purpose, annual goals, events, membership recruitment, etc.)

STEP 3 — COMPLETE THE REQUIRED PAPERWORK

- Groups must identify a chapter president and include a minimum of 5-10 chapter leaders who are dues-paying members of the Alumni Association
- The liaison member, who is part of the board is the Alumni Relations Officer
- These board members have agreed to serve a one-year term on the chapter executive board.
- Complete the official charter petition form including 5-10 signatures and a roster of chapter board members.
- Curate and approve chapter bylaws and policy framework by the Alumni Association
- Assure to meet the eligibility criteria made by the alumni association office of the respective university. Any breach of criteria assigned by the Alumni office may lead to the end of the chapter

STEP 4 — OFFICIAL RECOGNITION

- Upon review, the Alumni Association will convene a committee to review the charter petition and make a recommendation to the Board of Directors regarding the grant of a charter.
- The Charter will be reviewed in congruence with the mission and values of the university and of the Alumni Association and established chapter rules and regulations.
- A two-thirds vote is required of the Alumni Association Board of Directors for recognition of a new alumni chapter

3

ALUMNI MANAGEMENT



UNDERSTAND YOUR ALUMNI

According to the definition of the University of Oxford:

An alumnus (masculine, plural alumni) or alumna (feminine, plural alumnae) is a former student or pupil of a school, college, or university.

For an alumnus to be productive, resourceful, and engaging, it is best to start involving students from the start. An active and engaged student of today becomes an active and engaged alumnus tomorrow.

STUDENT LIFECYCLE

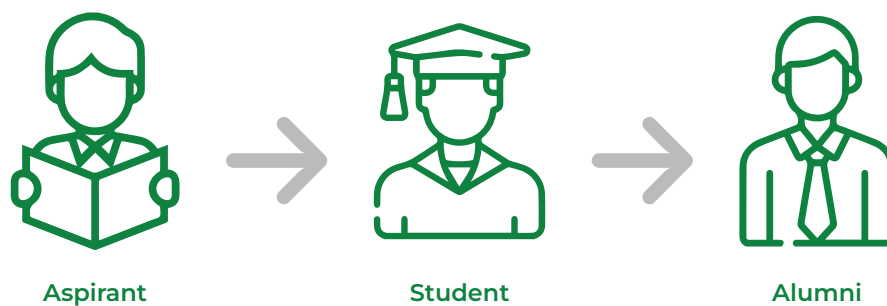


FIGURE 3.1

Before building an alumni association, it is important to understand how alumni evolve over a period of time and the distinct characteristics at each stage so that the institute can strategize ways to engage with different groups of alumni accordingly.

ALUMNI SEGMENTATION

Alumni of an institute can be segmented into many categories. Segmenting alumni helps institutions develop more tailored and cost-effective ways to communicate with their alumni and keep the alumni engaged. It also maintains an up-to-date database for effective outreach campaigns.

Alumni can be segmented according to:

1. Geographical spread.
2. Class year
3. Industry/Profession
4. Stage of Evolution
5. Affinities & interest groups

Geographical Spread

Segmenting alumni according to their location can benefit your institution in many ways. It can help you:

- assert your presence and promote your institution's brand value and goals in multiple locations
- outreach to important stakeholders in different regions, both locally and internationally

- carry out events in multiple locations
- promote cultural integration and unity across borders

Class Year

Grouping alumni according to their graduating class or batch year can enable you to:

- identify alumni according to their stage of evolution
- identify alumni that are likely to be more active
- identify, gauge, and compare your engagement tools and strategies
- create better engagement as alumni from similar batches are more likely to interact with each other.

Industry/Profession

Segmenting alumni according to their field will help bring more targeted support to the institute.

- They can help bring domain-specific donors who might wish to spend on the specific infrastructure e.g science labs, tech labs, innovation centers, etc.
- They can provide non-monetary services such as coaching, training, and seminars
- They can mentor students and young alumni in their career paths
- They can share domain expertise to revise and improve the courses and programs offered by the universities.

Stage of Evolution

What stage your alumni are at determines how resourceful they can be for your institution, students, and other alumni.

- **Recent Graduates** are nostalgic, feel attached to their institution, and are more likely to volunteer for their university actively. They are more in contact with their university colleagues, juniors, and community/society members as compared to old alumni.
- **Opportunists** are young professionals who are busy establishing their careers and are in search of opportunities, resources, and connections. They would welcome any career-building services and opportunities from their universities.
- **Contributors** have established professionals who have achieved considerable progress and success in their careers. They actively seek to give back to the institute either monetarily or in kind.
- **Advocates** are established and successful alumni with ample bandwidth to encourage more alumni to contribute to their communities. They also provide strong networking opportunities and bring on board potential sponsors and donors.

Affinities & Interest Groups

Segmenting alumni according to their shared interests can also be useful. For example, alumni who have previously been part of a sports team at the university can help raise funds and for upgrading of sports infrastructure at the institute.

ALUMNI DATABASE

WHY IS IT IMPORTANT TO DEVELOP AND MAINTAIN AN ALUMNI DATABASE?

An updated alumni database is an absolute asset for any university as it makes the alumni engagement processes more efficient and effective. After the establishment of an alumni office, one of the first tasks is to record and maintain alumni databases. To do this, the office has to identify the types of data set that would be important for decision making, for example, the total size of the alumni body, the average age of alumni, industries they work in, etc. This helps in alumni segmentation and in strategizing engagement methods accordingly.

Type of data required by the Alumni Office

There are two sets of data:

1. Database maintained by the University

Every university department has a database according to its needs and requirements e.g., data maintained by the admission office, career service office, and financial aid office. However, institutions typically collect the following type of data:

- Admission data (test score, matriculation results, etc)
- Demographics (gender, race, location)
- Academic information (CGPA, courses, and grades)
- Financial data (attained by the financial aid office of the university)

Alumni Office would require this type of data majorly for verification purposes. It is important that the Alumni office must maintain its Alumni database independently through centralized means. They should have the legal rights, policies, and bylaws set up that allow them to have access to the record, analyze and maintain alumni databases without the direct involvement of any other department.

2. Database maintained by the Alumni Office

The data set that is specifically gathered and regularly updated by the Alumni Office consists of:

- Alumni contact information (address, email and phone number, etc.)
- Employment information (employer contact, position, address, email, and phone number)
- Records of event participation (participation as a donor, an attendee at the alumni office events, or as volunteers, mentors, event leaders, etc.)
- Student record (year of graduation, degree, etc)

Discretionary alumni data will also be required based on alumni segmentation

- Hyperlink to alumni social media accounts (Fb, Twitter, and LinkedIn profiles)
- Alumni family information (alumni parents, spouses, and children)
- Participation of alumni in student activities (actively seek information on alumni who participated in universities activities and events during their student life)

INTEGRATION OF UNIVERSITY STUDENT DATABASE WITH THE ALUMNI OFFICE

One of the foremost duties of the Alumni Office is to maintain the alumni database from the start. In many universities, valuable student and alumni information is collected and stored by various university offices and academic departments. It is most likely possible their information might be different than the Alumni Office database and there might arise a conflict between the Alumni Office and the academic and other university departments. It is important to consolidate all students and alumni data under the alumni office.

Stepwise strategy to Integrate the university database under the alumni office



FIGURE 3.2

Ensure the trust of the governing bodies from the start regarding the needs and legal requirements necessary for a centralized alumni database management. A specialized task force will be responsible for alumni data management. Other departments and offices will be linked with the data management system after the approval of the trustees/governing board. Finally, the database will be actively managed and updated within a centralized system under the authority of the Alumni Office.

Online Tools for Database Management:

Alumni Office can leverage software and online tools, like CRM (Client Relations Management) tools, to collect and store alumni data.

Alumni software comes with many useful features:

- Event management
- Email marketing
- Social network integration
- Job Board
- Membership management
- Fundraising
- Insightful Statistics
- Integrated with the official university's website
- Integrated with other alumni tools such as alumni cards

The benefits of alumni software are multifold:

- An integrated and centralized way of data management
- Bridges the gap between students, alumni, and the university
- Time-effective and cost-effective database management
- Efficient management of alumni events
- Effective engagement and outreach strategies
- Data is easily recoverable

Examples of some Alumni software are:

- <https://www.gradsgate.com/>
- <https://www.almabase.com/>
- <http://www.alumnichannel.com/>

Other online tools for Alumni data management include:

1. Alumni Website
2. Alumni Mobile Application

Both the Alumni website and web application are significant tools for alumni management.

Alumni database management is one of the key functions of the alumni website as well as the alumni mobile application. It is also a prominent tool for alumni networking and engagement.

The Alumni management team will have direct access to the website and mobile application which is integrated with the CRM Alumni software.

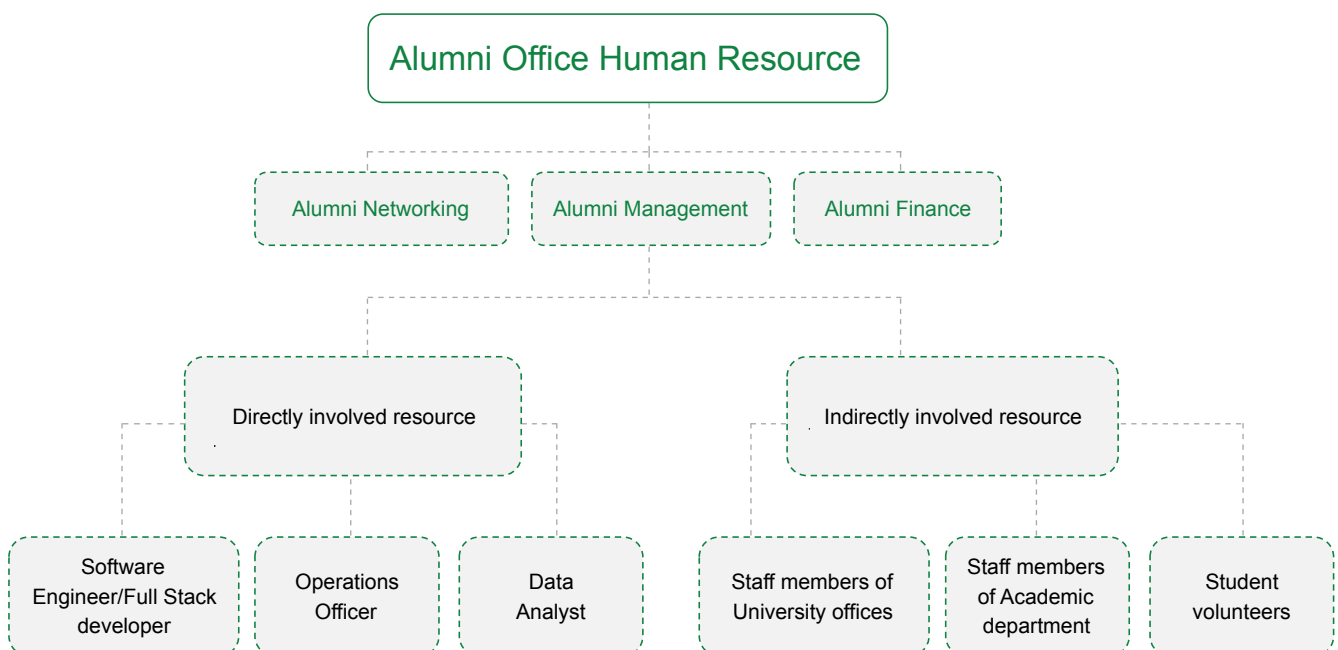


FIGURE 3.3

HUMAN RESOURCE FOR ALUMNI MANAGEMENT

Following are the basic Human Resource required by the Alumni Management department of the Alumni Office

Direct Resource:

1. Software Engineer/Full stack developer: Will design, develop, and provides technical assistance to the Alumni database software. They have the technical expertise and deal with software upgradation.
2. Operations Officer: Will make sure all the processes by the alumni management department are being performed smoothly. They have access to every channel. They will identify problems, solve and execute the necessary steps required to make the processes efficient. They have analytical expertise and deal with the backend.
3. Data Analyst: Both technical and non-technical skills are involved. They will create data management reports (monthly, quarterly and annual). Their reports will be responsible for making alumni databases meaningful and effective enough to form decisions.

In Direct Resource:

1. Staff members of university offices: Institution's offices such as Career Service, Academic Office, Financial Aid office, etc. relevant to the alumni office must have a liaison with the Alumni Office who will be responsible for sharing alumni information. They must update the alumni database on the alumni database software through a shared interface.
2. Staff members of the academic departments: Similarly, university academic departments must have a representative who will be responsible for providing direct information and reporting to the Alumni Office.
3. Student Volunteers: can be hired for research and data collection, and will be given a stipend or provided with certification.

4

ALUMNI ENGAGEMENT & NETWORKING



Alumni engagement describes how institutions maintain and nurture relationships with their alumni to build a strong network.

It is important to initiate engagement strategies with the students before graduation. It is essential to realize that the student experience should not end with graduation.

WHY IS ALUMNI ENGAGEMENT IMPORTANT?

Engaging alumni builds strong, long-lasting, and influential networking that can inspire substantial financial support and develop a regional or global community. They can serve as effective brand ambassadors, leaders, mentors, etc.

ALUMNI ENGAGEMENT ACCORDING TO THE STUDENT LIFE CYCLE



FIGURE 4.1

STAGE 1 — ADMISSION

Effective engagement starts at the early stage of admissions. Personalized communication at an early stage can make a big difference

- Inform your prospective new admissions about your alumni association through the university prospectus, website, and social media.
- Inform your prospective students about your successful alumni through advertisements on social media
- Inform your new admissions about your alumni association at the time of orientation

STAGE 2 — EXISTING STUDENTS:

- Institutions have information like students' academic departments, degrees, society memberships, sports teams, where they are from, what background they have, and any other interests they may have.
- Engage students in different activities e.g alumni association membership, volunteering in different alumni events and gatherings, fundraising activities, etc.
- Instill the concept that their bond with this institution is forever. Their contribution today will bring long-term impact and they are valued by their institution

STAGE 3 — GRADUATES STUDENTS

- It's important to register their details in the university's alumni database
- Engage them in multiple activities such as alumni annual dinners, distributing university branded merchandise, alumni cards, alumni memberships, etc.

ACTIVITIES PERFORMED BY ALUMNI RELATIONS

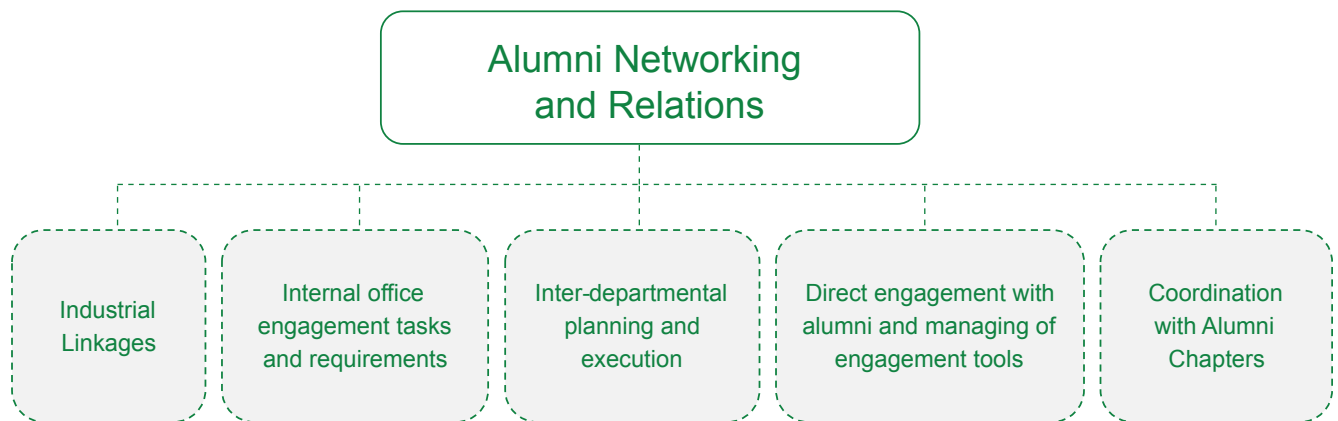


FIGURE 4.2

Following duties and tasks fall under the Department of Alumni Networking and Relations

1. Plan events and activities for the university alumni
2. Communicate with alumni through various channels such as email marketing, social media, meetings, and alumni community forums
3. Sponsor proposal drafting and distribution for alumni events
4. Meetings with inter-departments on planning and execution of Alumni events
5. Drafting of announcements, agendas for meetings, etc.
6. Approval requests to senior management and alumni board
7. Negotiation of discounts with various organizations on the basis of alumni links
8. Handling Alumni queries, requests, and grievances
9. Alumni Zakat Campaign, disbursement process, and announcement drafting
10. Outreach for funding campaigns in collaboration with Alumni Finance Department

COST-EFFECTIVE WAYS TO ENGAGE YOUR ALUMNI

1. Social Media (LinkedIn, Twitter, and Facebook)
2. Issue Alumni Cards (this will provide access to alumni to the university's library, innovation centers, research centers, etc. as well as discounts on university events e.g. festivals, concerts)
3. Membership in the university's Alumni Association/chapters
4. E-Magazines for alumni
5. Online alumni forums (based on interests, industries, location, or culture)
6. Email marketing and management (it is recommended to integrate it with alumni software for database management)

OTHER ENGAGEMENT TOOLS AND ACTIVITIES

1. Alumni Software integration
2. Annual Alumni Reunion
3. Alumni sports week
4. Alumni trips
5. Alumni debates
6. Gala Dinner and concerts
7. Quarterly or annual alumni get-togethers
8. Alumni Mentorship
9. Shared interest groups gathering
10. Alumni website
11. Alumni job portal
12. Alumni gifts or thank you notes

ENGAGE WITH ALUMNI ACCORDING TO THEIR EVOLUTION PHASE

1. Recent Graduates

- Invite them to Alumni Association events as volunteers and members
- Provide them with internships in the Alumni office
- Provide them with alumni cards
- Engage them through social media
- Engage them through the student's mobile application

2. Opportunists

- Provide them with Alumni Association membership
- Provide them with alumni cards
- Provide them with information on relevant jobs, career advisory services, etc.
- Invite them to alumni events
- Engage them in alumni forums,
- Engage them through the website
- Engage them in different university events as volunteers
- Engage them through social media
- Engage them through the alumni mobile application

3. Contributors

- Engage them in potential fundraising events and activities
- Share their success stories on the university's website, E-Magazine, mobile application, and social media
- Engage alumni at an annual dinner where contributors and advocates' contributions are acknowledged
- Engage alumni in different alumni forums and interest groups e.g Zakat funds, sports, donations, charity, etc.
- Engage them through alumni gifts or thank you notes
- Engage them through various alumni chapters

4. Advocates

- Engage these role models in maximum events, where students, young alumni, opportunists, and contributors can get motivated and encouraged.
- Engage them in annual/bi-annual course curriculum revision
- Engage them in multiple leadership and mentorship and career-building events
- Engage them by sharing their success stories on all social media platforms
- Engage them through alumni gifts and thank you notes
- Engage them in different alumni forums and interest groups.

HUMAN RESOURCE FOR ALUMNI NETWORKING AND RELATIONS

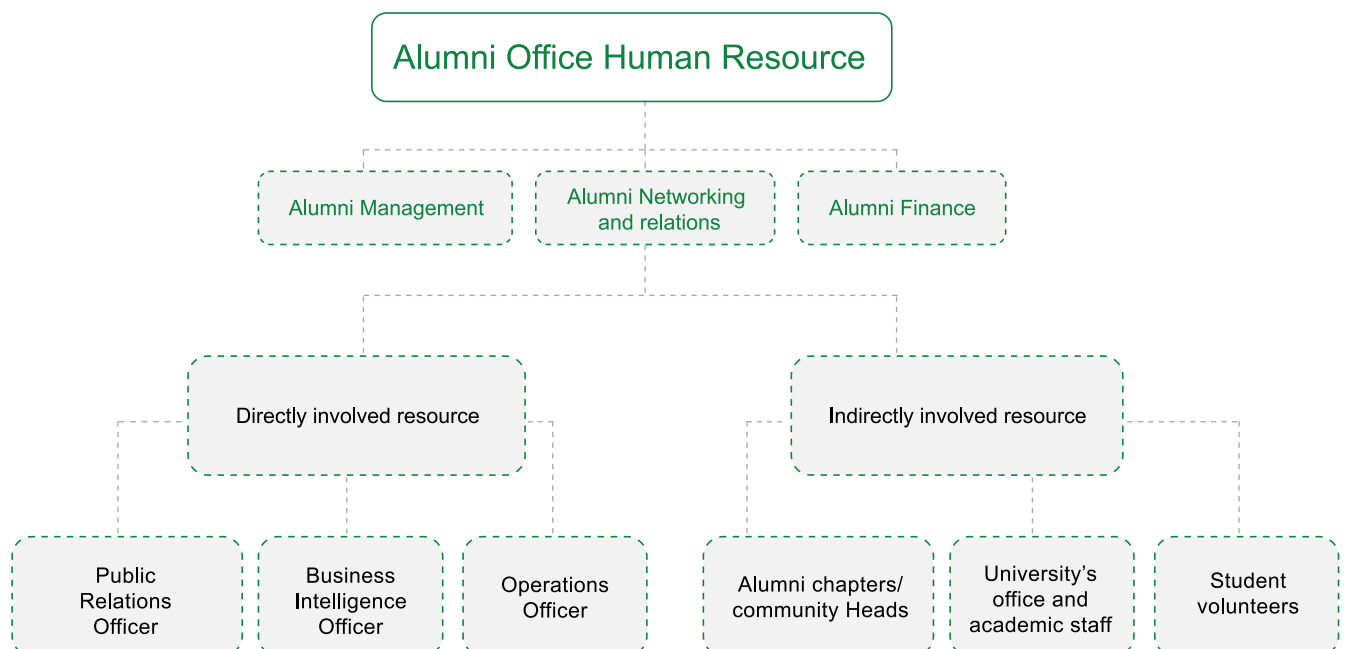


FIGURE 4.3

Direct Resource:

1. Public Relations Officer: He/She will be responsible for efficient communication and engagement with alumni according to their segmentation or evolution phase. They will be responsible for strategizing potential alumni outreach and networking. A lead volunteer for the alumni chapter will also come under this position.
2. Business Intelligence Officer: They will also be responsible for potential alumni outreach but they will make their analysis and provide reporting with identification of gaps in alumni engagement, and recommend solutions based on their alumni engagement data analysis reports. They will provide their findings, research, and analysis to the Public Relations Officer who will communicate with the prospective alumni.
3. Operations Officer: They will handle the internal management, reporting, and performance. They will identify challenges and issues faced specifically by the alumni networking and relations department. They will also be responsible for providing effective solutions and KPIs to the department in order to run the department processes smoothly.

In Direct Resource:

4. Alumni chapter/community heads: e.g governing board, executive committee, or Volunteer lead must regularly update and report to the Alumni office.
5. University's office and academic staff: all must report to the alumni office regarding any information related to alumni engagement.
6. Student Volunteers: Hire them for 3 to 6 months for gathering alumni information, organizing alumni events, etc. These volunteers can be existing students as well as recent graduates.

5

ALUMNI FINANCE



Financing an alumni association is equally important. Annual financial reports (e.g balance sheets) must be maintained and shared with the relevant stakeholders.

FINANCIAL MANAGEMENT

For each separately incorporated Alumni Association, the financial activity shall be administered and reported to its board in accordance with prudent business practices and generally accepted accounting principles.

1. Budget:

Each separately incorporated Alumni Association is responsible for developing and managing its budgets and operating plans, monitoring its fiscal status, and complying with applicable Laws by HEC, and applicable University rules and regulations. Annual budgets and plans should be reviewed by and approved by an alumni association's Board of Directors in partnership with the college President. Financial commitments and expenditures by the Alumni Association should be in accordance with the approved budgets and plans.

2. Cash and Treasury Management:

Each separately incorporated Alumni Association is responsible for managing cash. A proper policy framework should be held in place that addresses spending as well as income streams.

The finance committee should plan and search for long-term and short-term, private and public investment schemes.

Investment Policy:

Each separately incorporated Alumni Association should develop a written investment policy that addresses, among other things,

- Acceptable risk profiles
- Prohibited holdings for short-term and long-term investments
- Asset allocation strategy if invested outside of the university investment pool.
- A written spending rate policy that is linked to the investment policy

3. Purchasing and Disbursements:

Each Alumni Association should follow sound procurement practices and procedures that allows for open and free competition. All disbursements on behalf of a separately incorporated tax-exempt Alumni Association shall be approved by a duly appointed Alumni Association Officer or a member of the Board of Directors.

4. Accounting:

Each separately incorporated Alumni Association should maintain a centralized financial system that provides an accrual-based accounting system. All financial transactions should be recorded in the system.

MAIN REVENUE STREAMS

Revenue streams through which the Alumni Association can enlarge its pool of financial resources may include the following:

1. Sponsors & Donors are the significant contributors to the revenue pool.
2. Alumni Association Annual membership fee from alumni, parents/family members of alumni, University faculty, public and private organization members, etc.; These people benefit from multiple discounts and vouchers, free invitations to alumni events, etc.
3. Volunteer drive, where non-graduates and fresh graduates participate in different Alumni association events, can help raise funds, and bring potential donors.
4. Alumni chapters and council events such as concerts, charity, or social drives.
5. Long-term & Short term investment schemes are provided by the public and private sectors.

COST-EFFECTIVE WAYS TO ENHANCE FINANCIAL RESOURCES:

1. Use free or least expensive medium to channel alumni associations' activities e.g social media.

- Online fundraising
- Advertisement of upcoming events
- Constant engagement with alumni without any cost through online posts and live events.

2. Use of CRM software for maintaining and managing alumni database

- Saves time
- Improves efficiency
- Saves cost

3. Issue lifetime alumni cards

- Ensures alumni's long-term relation/loyalty with the university (increases alumni engagement)
- One-time cost-effective investment

4. Annual E-Publication or Monthly/quarterly E-Magazine

- Cost-effective
- Environmental friendly
- An effective tool of engagement

ACCOUNTABILITY, COMPLIANCE, AND REPORTING:

The Alumni Office has to ensure transparency in all its financial matters. It should seek the board's approval for the annual budget and the audited financial statements. The Finance Officer of the Alumni Association has to provide periodic financial reports to the Alumni Association Board for review. He/she should develop, administer, and communicate written policies and procedures for all key business functions, including:

- i. cash receipts and disbursements
- ii. gift acceptance
- iii. spending
- iv. endowment funds management, including asset allocation, the selection of investment managers, and the spending and investment
- v. procurement details (including travel expenses)
- vi. payroll details
- vii. inventory detail
- viii. agency accounts details
- ix. SOPs in case of conflicts of interest
- x. SOPs in case of any whistleblower

While drafting the financial policies, the Alumni Finance Office should keep in mind the following key points:

- Policies must require that disbursements are reasonable business expenses that support the campus, are consistent with donor intent, are adequately documented, and do not conflict with the law.
- If the Alumni Association engages a third-party (e.g. an auxiliary service corporation) to provide administrative support services, the Alumni Association must ensure that this third party has in place, to the extent applicable, the written policies and procedures enumerated above.
- Establish and maintain a system of internal controls designed to provide reasonable assurance of the achievement of objectives, reliability of financial reporting, safeguarding of assets, effectiveness, and efficiency of operations, and compliance with laws and regulations.
- Ensure that the proceeds of campus fundraising are appropriately recorded, credited, acknowledged, and administered based on legal requirements and donor stewardship parameters.
- The records, financial conditions, operations, and program outcomes of the Alumni Association are also subject to periodic audits by the Office of the University Auditor and, to the extent allowed by law, by outside regulatory bodies.
- All audit reports, certified financial statements, and any management letter, together with the corrective action plan of the Alumni Association must be promptly provided to the campus President and the Office of the University Controller.
- Management's corrective action plan should include the planned timeframe for addressing the independent auditor's comments.
- On an annual basis, the Alumni Association must certify to the University that it has complied all the regulatory filing requirements in accordance with the terms of the contract.

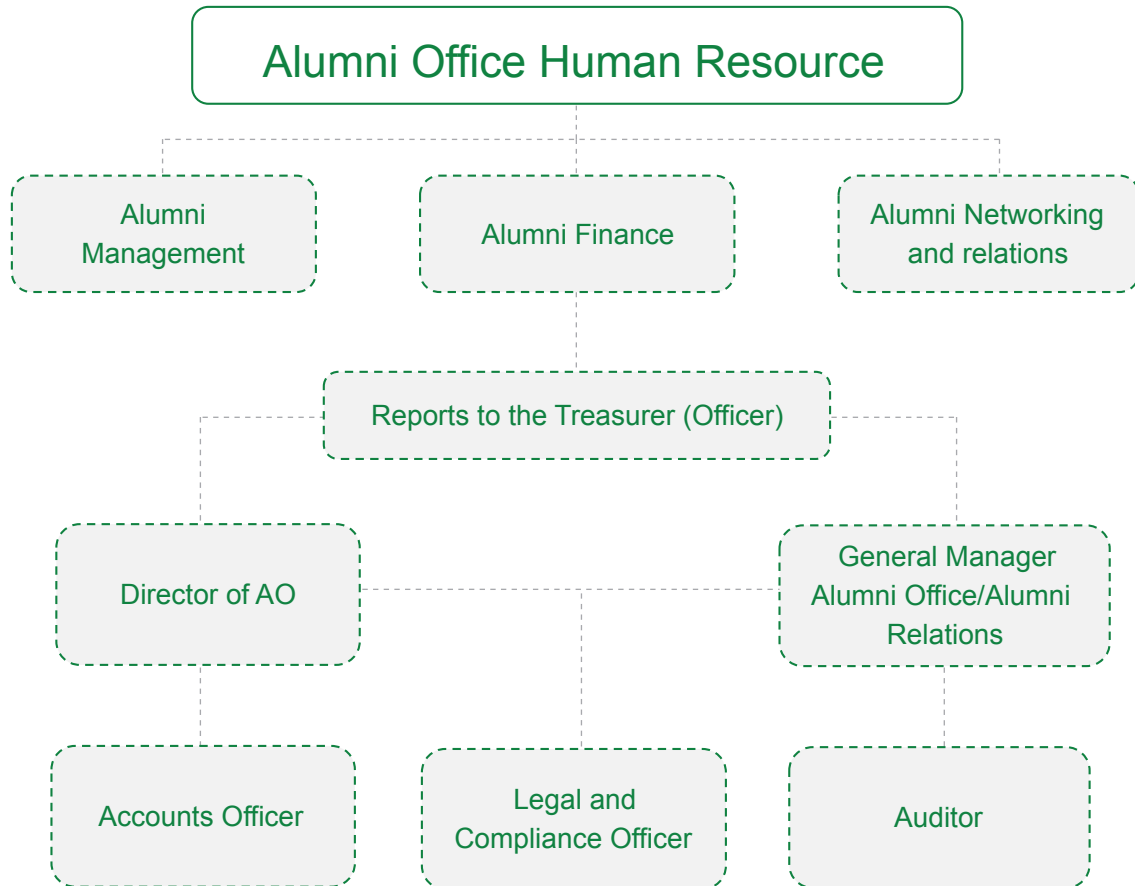


FIGURE 5.1

HUMAN RESOURCE: ALUMNI FINANCE MANAGEMENT

They will directly report to the Director of Advancement Office and GM of Alumni Office & Relations

Accounting Officer:

They will be responsible for making annual and biannual financial reports and maintaining financial accounts. These financial reports will be presented to the Board, Treasurer, and auditors for review and decision-making.

Legal & Compliance Officer:

He/She will be responsible for financial accountability, policy framework, bylaws of procurement and disbursements, and all the financial legalities.

Auditor:

He/she will audit financial reports, policies, and financial procedures. He/she has the authority to influence legal and financial matters and decisions, if anything goes against the Alumni constitution, set bylaws, and policies. He/she will audit the alumni association's fiscal reports annually and present their feedback in front of the finance committee as well as the Executive board.

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