

ALUMNI VOLUNTEER HANDBOOK





Dear Alumni Volunteer:

Thank you for taking the time to volunteer with your Alumni Network to help the continual life-long connection of UMass Lowell and alumni throughout the world. Chances are your experience at UMass Lowell, ULowell, Lowell Tech, Lowell State or any of the other predecessor institutions was one of great memories and true affinity and with over 70,000 alumni world-wide, your commitment to the University is greatly appreciated.

As a volunteer there are opportunities to plan events, assist with recruitment efforts, philanthropy, and much more. As you embark on this exciting adventure as an UMass Lowell Alumni Volunteer, we are happy to provide you with an Alumni Volunteer handbook to help guide you through the process. The handbook outlines a University overview with facts and figures, event planning information, examples of various initiatives to get involved in, communication vehicles and other pertinent material.

If you have any questions, comments, or concerns do not hesitate to contact us.

We truly appreciate your dedication and we could not do this without you! We look forward to working with you to bring vibrant programs to the UMass Lowell family all over the world.

Warm regards,

Heather Makrez, '06, '08
Director of Alumni Relations



TABLE OF CONTENTS

I.	_____ Alumni Network Mission and Initiatives.....	page 2
II.	University of Massachusetts Lowell.....	page 3
	A. History	
	B. Mission	
III.	Office of Alumni Relations	page 4
	A. Mission	
	B. Contact Information	
IV.	UMass Lowell Snap Shot	page 6
	A. Campus	
	B. Alumni	
V.	Job Description of Alumni Volunteers	page 10
	A. Description	
	B. Time Commitment	
	C. Major Responsibilities	
	D. Menu of Opportunities	
	E. Keep in Touch	
	F. Staff Resources	
VI.	Event Process	page 12
	A. Coordinating an event with a venue	
	B. Invitations	
	C. Event Logistics	
VII.	Communications	page 16
	A. Social Media	
	B. Alumni Magazine and E-Newsletter	
	C. Alumni On-line Community	
VIII.	Networks	page 17
	A. Regional	
	B. Affinity	
IX.	References	page 18
	A. Attachment 1: Confidentiality Agreement	
	B. Attachment 2: Event Checklist	
	C. Attachment 3: Event Feedback	
	D. Attachment 4: Network Initiatives Contact Information Form	



ALUMNI NETWORK

Mission

The Alumni Networks strive to create a close community for alumni and students of UMass Lowell through various platforms of communications, networking, social and educational programs and partner with the UMass Lowell community at large using their time, treasures and talent.

The Alumni Network Initiatives

- ❖ *Alumni and student engagement initiative*- Assist in developing beneficial programming for alumni and students to connect with one another.
 - Opportunities include: Social & networking events, educational opportunities, alumni speaker series, athletic game watches
- ❖ *Admissions recruitment initiative*- Partner with UMass Lowell Department of Admissions Director of Recruitment to help diversify the student population by outreaching to students in the various cities and states nationally and internationally.
 - Opportunities include: Attending college fairs on behalf of the University, calling or writing letters to admitted students, helping to host and organize admission receptions.
- ❖ *Communications initiative*- Partner with the Office of Alumni Relations and the University Advancement to increase the strategic outreach efforts of the University.
 - Opportunities include: Market University events to alumni, students, parents and friends through web and/or phone, creating write-ups and stories, sending photos, and more.
- ❖ *Alumni Services/Membership Recruitment initiative*- Identify and assist in alumni service and benefits.
 - Opportunities include: Helping with relocation questions, networking and recruiting alumni volunteers, identifying business discounts.
- ❖ *Philanthropy initiative*- Partner with the University Advancement to identify philanthropy initiatives for the University and your Alumni Network.
 - Opportunities include: Assist with identifying methods to fundraise at events, host a house reception, sign letters and/or make telephone calls to fellow alumni for particular initiatives.

The Alumni Networks provide opportunities for:

- ❖ Alumni and student networking opportunities
- ❖ Athletic pre-game gatherings
- ❖ Community service opportunities
- ❖ Educational workshops
- ❖ Promotion of University events



UNIVERSITY OF MASSACHUSETTS LOWELL

History

For more than a century, UMass Lowell has been preparing students to work in the real-world, solve real problems and help real people. The University began as the Lowell Normal School, a teaching college founded in 1894, and the Lowell Textile School, founded in 1895 to train technicians and managers for the textile industry. Over the next 75 years, both institutions extended their offerings to meet the growing needs of the region. Lowell State and Lowell Tech, as they were then known, merged in 1975 to form the University of Lowell. The campus became part of the University of Massachusetts system in 1991.

Mission

The University of Massachusetts Lowell is a comprehensive, public institution committed to excellence in teaching, research and community engagement. We strive to transform students to succeed in college, as lifelong learners and as informed citizens in a global environment. UMass Lowell offers affordable, experience-based undergraduate and graduate academic programs taught by internationally recognized faculty who conduct research that expand the horizons of knowledge. The programs span and interconnect the disciplines of business, education, engineering, fine arts, health and environment, humanities, sciences and social sciences. The University continues to build on its founding tradition of innovation, entrepreneurship and partnerships with industry and the community to address challenges facing the region and the world.



OFFICE OF ALUMNI RELATIONS

Mission

The Office of Alumni Relations offers comprehensive benefits and services to our growing and diverse alumni community to connect and reconnect alumni and friends to UMass Lowell. We work to engage alumni and students to create a strong UMass Lowell community all around the world. Alumni program success relies on the interest and involvement of our alumni and partnerships.

The Office of Alumni Relations provides opportunities for our alumni and serves them in the following areas:

- ❖ To foster a life-long learning relationship with our alumni.
- ❖ To help UMass Lowell grow and develop, and to reinforce the value of the UMass Lowell academic experience.
- ❖ To interact with fellow alumni and the University community in programs that enriches our professional, cultural and personal lives.
- ❖ To provide leadership and support and to participate in University life.
- ❖ To keep alumni informed of programming through the Alumni Magazine, the alumni web site, timely communications and publicity.



Contact Information

Heather Makrez '06, '08, Director of Alumni Relations

Phone: 978-934-4809

Email: Heather_Makrez@uml.edu

Reja Gamble, Assistant Director of Alumni Relations

Phone: 978-934-2208

Email: Reja_Gamble@uml.edu

Jacqueline Ledoux, Program Assistant for Alumni Relations

Phone: 978-934-2236

Email: Jacqueline_Ledoux@uml.edu

Diane Earl, Special Advisor for Alumni Relations

Phone: 978-934-4281

Email: Diane_Earl@uml.edu

General Contact Information

Office of Alumni Relations

One University Avenue, Southwick 250

Lowell, MA 01854

Phone: 978-934-3140

Fax: 978-934-3111

Email: Alumni_Office@uml.edu

Website: www.uml.edu/alumni



UMASS LOWELL SNAP SHOT

Campus Quick Facts

- ❖ US News & World Report ranks UMass Lowell among the top 200 research universities nationally
- ❖ Times of London ranks the UMass system 56th of the top 200 universities in the world and 19th for academic and research reputation
- ❖ Forbes Magazine ranks UMass Lowell as one of the top 650 undergraduate institutions in the country
- ❖ 2010 President's Higher Education Community Service Honor Roll with Distinction

The University offers more than 120 undergraduate, 32 masters and 20 doctoral degree programs in six colleges:

- ❖ Manning School of Business
- ❖ Graduate School of Education
- ❖ Francis College of Engineering
- ❖ College of Fine Arts, Humanities & Social Sciences
- ❖ School of Health & Environment
- ❖ College of Sciences

Tuition and Fees

Annual Undergraduate Tuition and Fees (2012-2013)

	Tuition & Fees	Room & Board	Total
In State	\$11,847	\$10,282	\$22,129
Out of state	\$24,896	\$10,282	\$35,178

Annual Graduate Tuition and Fees (2012-2013)

In State	\$11,228.94
Out of state	\$20,773.98

Financial Assistance

In the 2012 school year, we awarded more than \$120 million in financial aid and met an average of 92% of student financial need.



University Enrollment

Enrollment (Fall 2012)

	Headcount
Undergraduate	9,401
Graduate	4,007
Continuing Studies	2,886
Total	16,294

Percentage of:

	Undergraduate	Graduate
In-state students	90.5%	65.1%
Out of state and international students	9.5%	34.9%
Students of Color	28.6%	21.3%
Females/Males	39/61%	49/51%

Incoming Undergraduates (Fall 2012)

Freshmen	1,495
Transfers	1,119
Total	2,614

Freshmen Facts (Fall 2012 preliminary)

Average combined SAT score	1127
Average GPA	3.26
Percentage living on campus	83%
Percentage enrolled in learning communities	100%



Degrees Granted (May 2012)

Doctoral	93
Master's	739
Bachelor's	1,836
Associate's and Certificates	146
Total	3,204

Faculty & Staff

Faculty	556
Staff	741
Total	1,297



Alumni Quick Facts

Total alumni: 75,000

Massachusetts residents: 46,000



JOB DESCRIPTION OF ALUMNI VOLUNTEERS

Description

Provide leadership for the UMass Lowell Alumni Community. Provide service to UMass Lowell and encourage other alumni to give their time and talent to the University. Assist the staff in planning, evaluating and execution of alumni programs.

Time Commitment

Participate in at least two events a year, and approximately three hours per month of volunteer time.

Major Responsibilities

- ❖ Know and follow the mission of UMass Lowell.
- ❖ Be an active member.
- ❖ Attend the reunion and play an active role during the fall festival weekend.
- ❖ Attend as many Alumni Relations sponsored events as possible and encourage other alumni, parents and friends to join you.
- ❖ Assist the Office of Alumni Relations in identifying future alumni leaders.
- ❖ Set an example for the alumni community by financially supporting the University.
- ❖ Help identify alumni award nominees.
- ❖ Provide alumni candidates to profile in marketing materials.
- ❖ Serve as an ambassador for quality higher education.
- ❖ Exercise loyalty toward the University and confidentiality regarding its internal affairs.

Menu of Opportunities

- ❖ Assist in alumni office recruitment efforts for events.
- ❖ Work/attend independent alumni- sponsored events.
- ❖ Provide support at athletic events.
- ❖ Assist with Admissions Department recruitment efforts.
- ❖ Attend Chancellor's/VIP visit receptions.
- ❖ Participate in mentoring student.
- ❖ Offer alumni relocation assistance.
- ❖ Attend home- hosted alumni parties.
- ❖ Identify opportunities for University marketing.
- ❖ Make alumni award nominations.
- ❖ Help identify local business discounts.

Keep in Touch

To successfully support and service alumni, the Office of Alumni Relations asks that volunteers keep the office updated on how the group is developing and on any upcoming meetings or event ideas.

Meetings

If alumni networks host a meeting, they may feel free to invite an Office of Alumni Relations staff member to attend the meeting. Having a staff member at the meeting to answer questions and provide insight from a University perspective. If any minutes are recorded, they should be shared with the Office of Alumni Relations.



Contact Information/Record Updates

If you know of an alumna/us who has a new home address or email address, we ask that the Office of Alumni Relations be informed. Obtaining this information is imperative in making sure that the alumni records are up to date and accurate, and helps the University better serve the alumni groups.

Staff Resources

Director of Alumni Relations, Assistant Director of Alumni Relations, Special Advisor and Program Assistant

The Office of Alumni Relations staff will:

- ❖ Assist with program development and event logistics to ensure the success of alumni programming.
- ❖ Communicate with alumni groups, either electronically or through printed correspondence.
- ❖ Meet yearly with alumni groups.
- ❖ Provide alumni contact list to assist with the Network's programming efforts.



EVENT PROCESS

Successful event planning involves close attention to a variety of variables. When volunteers contact a venue or caterer directly, there are several guidelines. Below are some basic tools that will assist volunteers in successfully developing and executing events.

Events should be planned at least eight to twelve weeks in advance, and advertised to alumni at least six weeks ahead. This is coordinated through the Office of Alumni Relations.

If a volunteer is hosting a house party at his/her home, they should contact the Office of Alumni Relations to ensure appropriate planning.

Coordinating an Event

Volunteers must ensure that the venue can accommodate requirements for the event

- ❖ When considering event venues, volunteers must ensure the space can accommodate the expected number of guests.
- ❖ The date must be secured and booked with the venue.

UMass Lowell is a tax-exempt, 501 C (3) organization. Volunteers must inform the venue contact of this status. Proof of the University's tax exempt status is available through the Office of Alumni Relations.

Food

Volunteers ordering food for events must be sure that the cost per person is within the allotted budget discussed with the Office of Alumni Relations. Members of the Office of Alumni Relations will assist volunteers in food choices – venues will share a copy of the menu selections with them.

Beverages

Volunteers may consider a number of beverage plans including cash bar, complimentary non-alcoholic beverage service or open bar. Prior to ordering beverages, the type of service should be determined in conjunction with the Office of Alumni Relations. Volunteers may then coordinate the approved beverage plan with the venue staff. A copy of the beverage plan should be forwarded by the venue to the Office of Alumni Relations.

Contracts

Volunteers may not sign contracts for events paid for by the University. Volunteers who sign contracts are then liable for all related costs and conditions. Contracts should be sent to the Office of Alumni Relations for proper signatures.

Payments/Deposits

There are two ways to pay for an event. The Office of Alumni Relations handles all required payments with venues, unless an alumni volunteer/s would like to pay for the event as a gift in kind to the University.



Campus and University Policies

Events held at the University should be coordinated with the Office of Alumni Relations to ensure University policies are adhered to and that the proper University departments are involved to for a successful event.

These spaces are scheduled by Conference & Event Services at 978-934-3888. Contact Conference & Event Services (CES) for information on the scheduling of any other University facility.

Reservation Priority

Facilities are reserved on a first-come, first-served basis. Reservations shall be made through the CES. The CES reserves the right to assign or move events to the best available space if the requested space is unavailable. Reservations may be cancelled or moved per order of the Chancellor's Office.

Event Sponsors

Requests for reservations are submitted by student clubs and organizations, academic and administrative departments and external entities. Sponsors must designate an individual who will serve as the primary event contact with University Special Events staff. If the University is a sponsor or co-sponsor, a University contact should be named

Submitting a Request

A reservation request form must be submitted at least two weeks prior to the date of an event, four to six weeks for events serving alcohol. Late request will not be guaranteed.

Major programs, such as concerts or conferences, require a one-month advance reservation submission. Submitting this form is not a guarantee that a particular space is available. All necessary signatures and approvals are expected upon submission.

University facilities are generally available for use between the hours of 7:30 a.m. and 12 a.m. during the week and until 1 a.m. on weekend nights. The University reserves the right to restrict or deny room reservation requests.

Facility Damage

Any damage to University facilities will be immediately reported to the CES, the Facilities Department and/or the University Police Department. Cost to repair all damages other than normal wear and tear will be the responsibility of the event sponsors. If the facility is not returned in the same condition as received, cost of clean-up will be the sole responsibility of the event sponsor. Billing for these costs will be processed through the CES.

Nothing will be affixed to any facility (e.g., inside and outside walls, stage curtains, etc.) without approval by Conference and Event Services. It is highly recommended that pre- and post-event walk-throughs are conducted with the CES.

Policy on School Cancellations and Scheduled Activities

The University's top priority is the safety of faculty, staff, students and visitors. To that end, the campus can be closed (and classes cancelled) when inclement weather can cause hazardous conditions or create a power outage.



The Vice Provost, in conjunction with Facilities Department personnel, makes the decision whether to close the campus during emergency conditions, usually by 6 a.m. Closings or delays are posted on the University's webpage banner, on Boston television stations, WUML (91.5 FM) and WCAP (980 AM) radio, as well as the University hotline at 978-934-2121. Employees and students also are encouraged to sign up for the emergency notification system for e-mail, text and voicemail alerts. When the University has closed for an emergency, classes, activities and events on campus also are cancelled, unless otherwise stated in official notifications.

If the governor issues a State of Emergency, or if campus buildings cannot be safely operated and occupied, there can be no exceptions to this.

Alcoholic Beverages Policy

Policy Statement - The University of Massachusetts Lowell (UMass Lowell) prohibits the use of alcoholic beverages in all workplace and academic settings and all UMass Lowell-controlled buildings and properties, except for specifically sponsored events in designated areas and only by those individuals of legal Massachusetts drinking age. In addition, while on UMass Lowell-controlled property, the unlawful manufacture, distribution, dispensation, possession, use and/or sale of alcohol is strictly prohibited. Any UMass Lowell-sponsored event that includes alcoholic beverages must be approved by the Chancellor or his designee.

Reason for Policy - The University of Massachusetts Lowell upholds federal, state and local laws and regulations and wishes to ensure the health and safety of its community, minimize any intentional or non-intentional misuse of alcohol, and provide a healthy educational environment that supports the rights of individuals.

Entities Affected By This Policy

All faculty, staff, contracted employees, consultants, volunteers, students or any other person visiting any UMass Lowell-controlled property unless otherwise stated in the policy and/or specified in prior agreements are covered by this policy. Additionally, this policy shall be in effect at any sanctioned and supported University of Massachusetts Lowell event that includes property not under the legal control of the University. For the University's entire event policy, visit www.uml.edu/Events/Reservation-Policy.aspx.

Invitations

Events require different forms of invitations. In most cases, there will only be a need to email invitations, but occasionally a printed piece is required. The Office of Alumni Relations will collect information for invites and send all email/print invitations to appropriate alumni groups. The Office will also post the events on the Alumni website.

The volunteer will partner with the Office of Alumni Relations to ensure that the proper event details are communicated.

Alumni volunteers also call and email invitations to personally invite alumni. The Office of Alumni Relations will supply the proper information to contact alumni. Due to privacy laws, prior to receiving other alumni information, all volunteers will fill out a confidentiality agreement. The agreement indicates that the information received will only be used to invite alumni to a particular event.



Event Logistics

Alumni will always register with the Office of Alumni Relations to ensure that accurate event attendance data is maintained and recorded. If a representative from the Office of Alumni Relations isn't present at the event, the volunteer will oversee that all proper data and monies are forwarded to the Office of Alumni Relations following the event.

If an alumnus/a doesn't register with the Office of Alumni Relations, volunteers should document their information on the walk-in form.

If it is a paid event, and payment is received by the guest when they arrive, volunteers should document the amount received and place all monies in a proper and safe location until presenting it to the Office of Alumni Relations.

After the event, volunteers are encouraged to provide feedback. If volunteers take pictures at events, they are asked to forward them to the Office of Alumni Relations for potential marketing use.

Event boxes

When alumni volunteers host an event without an Alumni Relations representative present, the Office of Alumni Relations provides an event box which includes:

- ❖ Disposable table cloth for the registration table
- ❖ Name tags for registered guests and extra nametags for walk-ins
- ❖ Registration sheets for checked-in guests and walk-ins
- ❖ Donation Box
- ❖ Alumni Decals



COMMUNICATIONS

Social Media

The Office of Alumni Relations employs a variety of strategies to share information about alumni news and events. Social media are used, including the alumni Facebook page, LinkedIn and Twitter accounts.

Alumni Magazine and E-Newsletter

The Office of Alumni Relations highlights alumni in the Alumni Magazine and e-newsletter; this is an opportunity to recognize interesting and notable alumni from a range of industries and programs. If a volunteer has someone he/she believes is a good candidate to be highlighted in one of our publications, they should coordinate with the Office of Alumni Relations.

Alumni On-line Community

The Office of Alumni Relations recently launched a new on-line community where alumni have an opportunity to connect and stay in touch with fellow classmates and stay up to date with the latest alumni and University news. The on-line community provides an alumni directory, listing of upcoming events, photo galleries and more. Alumni can log-in via the alumni website or if the alumnus/a hasn't registered to join the on-line. Volunteers may encourage fellow alumni to check out the website.



NETWORKS

The Office of Alumni Relations brings programming opportunities to fellow alumni who have shared a certain affinity while they were students. Some affinity groups include:

National Networks

- ❖ Arizona
- ❖ California- Northern
- ❖ California- Southern
- ❖ Colorado
- ❖ Florida- East
- ❖ Florida- West
- ❖ Georgia
- ❖ New York
- ❖ New Mexico
- ❖ Washington, D.C.

International Networks

- ❖ China
- ❖ Greece
- ❖ India
- ❖ South Korea
- ❖ Taiwan

Affinity Networks/Groups

- ❖ Athletic Alumni Network
- ❖ Black Alumni Network
- ❖ Corporate Employee groups
- ❖ Departmental or College-based
- ❖ Double River Hawks
- ❖ Greek Alumni Council
- ❖ Student Leader Alumni Network
- ❖ Women Engineering Network



REFERENCES

Various forms and templates are available to help volunteers prepare for an event. The enclosed forms outline the appropriate materials and event logistic guidelines to guarantee a successful event.

- ❖ Confidentiality Agreement – Attachment 1
- ❖ Event Feedback – Attachment 2
- ❖ Event Checklist – Attachment 3
- ❖ Alumni Network Subcommittee Contact Information Form – Attachment 4



CONFIDENTIALITY AGREEMENT

I agree that I will not disclose or use, in any manner, any confidential or proprietary information or material concerning UMass Lowell, its constituents, or its operations, unless I am required to do so in order to conduct the business of UMass Lowell/University Advancement in its ordinary course, and the disclosure or use is only within or expressly authorized to do so by a University Advancement staff member.

I have read this document, and I understand and agree to abide by its provisions.

Print Name

Date

Signature

Date



EVENT FEEDBACK FORM

Event name: _____

Event date: _____

Volunteer's name: _____

Please tell us more about the event, including an overview of how it went:

What was your favourite thing about the event?

What could have gone better?

Additional comments or thoughts?



ALUMNI VOLUNTEER EVENT CHECKLIST

Event Contact:

Event Name:

Event Date/Time:

Budget:

of Guests:

Event Location:

Target Audience:

Print Materials Needed:

- Postcard
 Save the Date
 Buck slips
 Invitation
 Reply card
 Business Reply Envelope
 Mailing Envelope
 Poster
 Program Book
 Reserved signs
 Banners
 Directional Signs

Export list request: Criteria:

Who is receiving printed invitations?

Who is receiving emailed invitations?

Event Needs:

- Centerpieces/Florist
 Table Linens
 Lighting Specialist
 Other Décor
 Audiovisual
 Gift/Souvenir
 Entertainment
 Photographer/Camera
 Parking
 Catering
 Name Tags

Staffing:

Advancement Staff:

Volunteers:

Chancellor/Vice Chancellor Notification: Yes No

Speaking Points: Yes No
 Who will be providing: Due Date:

Other:

- Event details communicated to all volunteers and the Office of Alumni Relations
- Name Tags/RSVP List
- Registration table/tablecloth/banner/signage
- Inventory/day of supplies needed
- Estimated costs for event/ final invoices due date
- Follow Up/thank you letters



ALUMNI NETWORK INITIATIVE CONTACT INFORMATION

ALUMNI NETWORK: _____

- ❖ Alumni and student engagement initiative- Assist in developing beneficial programming for alumni and students to connect with one another. Opportunities include: Social & networking events, educational opportunities, alumni speaker series, athletic game watches

<i>NAME</i>	<i>EMAIL</i>	<i>PHONE</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

- ❖ Admissions recruitment initiative- Partner with UMass Lowell Department of Admissions Director of Recruitment to help diversify the student population by outreaching to students in the various cities and states nationally and internationally. Opportunities include: Attending college fairs on behalf of the University, calling or writing letters to admitted students, helping to host and organize admission receptions.

<i>NAME</i>	<i>EMAIL</i>	<i>PHONE</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

- ❖ Communications initiative- Partner with the Office of Alumni Relations and the University Advancement to increase the strategic outreach efforts of the University. Opportunities include: Market University events to alumni, students, parents and friends through web and/or phone, creating write-ups and stories, sending photos, and more.

<i>NAME</i>	<i>EMAIL</i>	<i>PHONE</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



- ❖ *Alumni services & membership recruitment initiative*- Identify and assist in alumni service and benefits. Opportunities include: Helping with relocation questions, networking and recruiting alumni volunteers, identifying business discounts.

<i>NAME</i>	<i>EMAIL</i>	<i>PHONE</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____

- ❖ *Philanthropy initiative*- Partner with the University Advancement to identify philanthropy initiatives for the University and your Alumni Network. Opportunities include: Assist with identifying methods to fundraise at events, host a house reception, sign letters and/or make telephone calls to fellow alumni for particular initiatives.

<i>NAME</i>	<i>EMAIL</i>	<i>PHONE</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____