

# Tufts Alumni

## SHARED INTEREST GROUPS

### **WORKING MANUAL FOR ALUMNI VOLUNTEER LEADERS APRIL, 2011**

This Shared Interest Groups (SIG) Manual provides general guidelines and information for alumni interested in establishing a SIG, and serves as a resource for currently existing SIGs. Please note that this is a working, organic document.

Shane Dunn  
Alumni Relations Officer – Shared Interest Groups

## I. TUFTS UNIVERSITY ALUMNI ASSOCIATION

### Mission of Tufts University Alumni Association

The Tufts University Alumni Association (Tufts Alumni or TUA) strives to promote Tufts' spirit, tradition, and collegiality and to strengthen the links among alumni and their alma mater. All graduates from any school or program at Tufts are automatically lifelong members, free of charge, of the Tufts University Alumni Association. For more information on Tufts Alumni, visit [tuftsalumni.org](https://tuftsalumni.org).

As outlined in its most recent strategic plan, the key messages of Tufts Alumni are:

- *Extend* your Tufts education throughout your life
- *Shape and sustain* an institution that shaped you—and shapes the world
- *Mentor and strengthen* future generations of students and alumni
- *Connect* with dynamic, fascinating, and accomplished alumni
- *Cultivate* your career and personal interests
- *Lead* groups and communities to make a difference

**The Tufts University Alumni Association is an independent corporation, but its volunteers and leadership work closely with the Office of Alumni Relations (administrative staff employed by the university) to implement programming and strategy.**

## II. PROGRAM OVERVIEW

### Shared Interest Groups

*Alumni Shared Interest Groups (SIG) (sometimes referred to as “affinity programs” at other schools) at Tufts are domestic and international communities of alumni that share a common affinity based on shared experience, identity and background, organizational or academic affiliation, profession, or other Tufts-related interest. Shared Interest Groups provide a tangible way for Tufts to identify and engage alumni in the life of the university and its alumni population through events, communications, and shared networks. Membership in individual groups based on shared culture, identity, and profession is open to any member of the Tufts community. To learn more, visit*

<http://tuftsalumni.org/connect-with-alumni/shared-interest-groups/>.

Regardless of Shared Interest Group type, size, level of activity, and complexity, it is recommended that all official SIGs develop a leadership team, or steering committee, to ensure the following:

- Responsibility for planning and implementation of events and outreach is distributed in manageable portions
- All activities and programs sponsored by Tufts Alumni are representative of the specific SIG, thereby facilitating communication
- Consistency and coordination of local Tufts-related activity
- Diversified program planning that is responsive to the variety of interests and needs of targeted alumni is developed

### TUAA-Recognized

#### Shared Interest Group Chapters

Advocates for Tufts ROTC | Asian American Alumni Association | Association of Tufts Alumnae | Black Alumni Association | Pride on the Hill – LGBT Alumni and Allies | Returning Students Alumni Association (REAL Alumni) | TCU Senate Alumni Gavel Society | Tufts Gordon Institute Alumni Association | Tufts Hillel Alumni Alliance | Tufts Journalism Society | Tufts Lawyers Association | Tufts Senior Connection | Young Friends of Tufts Advancement (YFTA)

### III. TUAA + SHARED INTEREST GROUPS GOVERNANCE

The Tufts University Alumni Association is governed by the alumni-elected Alumni Council and its subcommittees. The Alumni Council's leadership committee is the Executive Committee, which is led by the President of the Tufts University of Alumni Association. Barbara Clarke, J88, is president of TUAA through June 30, 2012. Additional subcommittees oversee and provide guidance to individual programs and issues managed by and within TUAA. The Shared Interest Groups Committee oversees the recognition, promotion, and funding of individual Alumni Shared Interest Groups. Shared Interest Groups are alumni-driven, meaning most ideas and project/program implementation are submitted by alumni, rather than all ideas coming from TUAA and the Office of Alumni Relations (OAR). The Alumni Relations Officer for Shared Interest Groups is a professional liaison to the committee.

The development of Shared Interest Groups is a somewhat organic process. Typically, groups of alumni who share a common background or experience form together on their own, communicate with others via social and other networks, and plan "unofficial," non-TUAA or –OAR-sponsored events to bring alumni together. At some point, alumni tend to reach out to the Office of Alumni Relations looking for support to grow their networks and potential event opportunities. After this initial "incubation" period of not being recognized, alumni groups are welcome to contact an OAR staff member to begin the process of formally organizing their group and to seek out recognition from the Alumni Association. Following the initial contact with OAR staff, the following process is implemented and followed by alumni volunteers to formally recognize their programs and group. The primary goal for most groups is to earn chartered status as an official alumni group of the Tufts University Alumni Association.

#### *GROUP RECOGNITION*

##### Tufts Alumni Shared Interest Group Recognition Process

- **Any potential new Tufts Alumni Shared Interest Group creates a brief 1-2 page proposal including leadership roles, mission, goals, and initial one year plan for the proposed Shared Interest Group** (a sample applications is included in the Appendix)
  - **Structure: most groups are comprised of three- to four-person steering committees, although not each one operates in that exact manner. Many groups currently have one to two active, ongoing volunteers, serving as president or chair.**
- **Once the proposal is approved by TUAA (Shared Interest Groups Committee and Executive Committee), the Shared Interest Group is granted "Provisional Status" and begins to plan events and communications for its alumni**
  - **With Provisional Status, a new Shared Interest Group is in a trial phase**
- **After 2-4 years of progress toward achievement of the Shared Interest Group's stated goals, the group may apply to become a "Chartered" chapter of TUAA explaining its future plans in terms of budget, events, leadership, sustaining the chapter, and attracting new members**

- **Chartered Shared Interest Groups have a proven track record of success**
- **Each Shared Interest Group is reviewed a minimum of once every 5 years or per recommendation by the Office of Alumni Relations (OAR). Groups that are no longer functioning may be dissolved**
  - **Ensures that existing Shared Interest Groups are still active, successful, and focused**

**Group of Alumni with Shared Interest → Preliminary Event → Application to OAR/Shared Interest Groups Committee → Provisional (“trial”) Status → Successful Event(s) → Chartered Chapter of TUAA**

## IV. BENEFITS TO ALUMNI SHARED INTEREST GROUPS

There are many benefits associated with being a recognized (or on the path to recognition) Shared Interest Group. Below are the list of benefits you can expect to receive from TUAA and OAR:

- **E-Mail broadcast:** You'll be part of a system where messages can be sent from the University to your chapter members at no cost. It's important for alumni to keep Alumni Relations updated, though, so we can keep track of alumni and continue to update records and lists. In Boston, New York, and Washington, DC, events will be added to a weekly digest of events in the area.
- **Lists of alumni, parents, and friends:** Alumni Relations will provide contact lists on request, based on geographic and interest/identity.
- **Professional and social networking opportunities:** As part of a larger universe of alumni organizations, your chapter will enjoy many new opportunities for contacts.
- **Event planning and budgeting guidance:** Trained professionals will assist your chapter in creating a budget, project plan, timeline, marketing and communications, logistics, etc.
- **Access to Tufts University Alumni Association contacts:** Alumni Relations will provide shortcuts by putting you in touch with the right venues, vendors, entertainment, catering services, facilities services, and staff/faculty/students within the University to enhance your events.
- **University speakers for chapter sponsored events:** A dedicated Alumni Relations staff member will suggest and contact speakers for chapter events, then work closely with your chapter contact to facilitate arrangements.
- **Alumni Relations staff at your meetings:** When possible, Alumni Relations staff member(s) will attend meetings and events, providing hands-on guidance and assistance.
- **Supplies for events:** Nametags and Tufts giveaways are available upon request at reasonable/limited cost.
- **Access to on-campus venues for events:** The Office of Alumni Relations will assist you in booking choice space for your meetings.
- **Opportunity to interact and learn from Leadership at Tufts:** At Alumni Council meetings and social events, meet and talk with senior administrators, deans, professors, and other alumni leaders.
- **Membership on the Tufts Alumni Council:** Your chapter appoints an official Associate Member to the Alumni Council with full voting rights and privileges.
- **Participation in university alumni governance:** You'll have the opportunity to contribute to and influence the alumni-wide governance process through the TUAA, Alumni Council, and by voting for Tufts alumni-elected trustee(s).
- **Leadership and skill development for Chapter Leaders:** Leaders will gain valuable experience in planning events, communications, budgeting, and professional development.
- **Opportunity to apply for funding:** Each chartered chapter receives annual funding from TUAA.
- **Recognition.** Each fall, nominations are requested for the Alumni Chapter Leadership Award, an award intended to recognize outstanding alumni volunteer leadership.

## V. CHAPTER PROGRAMMING AND EVENT PLANNING

A successful Tufts Shared Interest Group is the result of meaningful programming and communication, and the following important areas of consideration are important to that success:

- **Annual Calendar:** Group leadership is encouraged to meet in the summer to discuss plans for the upcoming year's events. These events, even if just faint ideas, should be shared with OAR staff contact.
- **Variety:** Plan a diversified calendar of events that will be appealing to a cross-section of your group's alumni base.
- **Annual or signature event:** Consider establishing a signature event that "anchors" your alumni programming during the year. (For Tufts Hillel, that's "Miracle Martini Night.")
- **Check Dates:** Check local calendars as well as religious calendars to avoid obvious conflicts. For example, those of the Jewish faith refrain from social activity during Rosh Hashana, Yom Kippur, and Passover.

### Steps for Planning an Event or Other Alumni Initiative

- 1) **Brainstorm it.** If you have an idea for an event, share it with at least two other alumni, whether they identify with your group or target audience or not. Gauge their interest in the event, get their feedback, and strengthen your idea.
- 2) **Share It.** Reach out to the Alumni Relations Officer for Shared Interest Groups ([sharedinterestgroups@tufts.edu](mailto:sharedinterestgroups@tufts.edu)) in the Office of Alumni Relations as soon as you have an idea of what you'd like to plan—the sooner the better. Share your idea, where it came from, what the goal of the event is, when you want to have it, where it should be, etc. Have a conversation, and flesh out details.
  - a. **Advance planning is the secret to success, and here's why:**
    - i. Blast emails and other communications can be planned for maximum impact, effectiveness, and economy.
    - ii. OAR staff has a better chance of obtaining the resources, deals, and speaker(s) (if applicable) for your event with adequate time.
    - iii. University financial and human resources can be used more efficiently
- 3) **Communicate it.** Create a communications message for the event. Again, what's the event's purpose and why is it important? Write up a brief description of the event and share it with your staff contact at OAR. OAR relies on alumni volunteers to communicate the purpose of the event...after all, it's your event!

- 4) **Plan it.** Work with OAR staff contact to secure venue, decide on admission price (if applicable), choose food and drink, identify audience of invitations, discuss the scope and purpose of the event, etc.
- 5) **Communicate it (2).** It's very rare that a print piece will be sent out. Email is available, but we need details as soon as possible, preferably one- to two-months before your planned event. Emails will be sent out to a broad list of alumni depending on region and identifiable traits on our database. An event may also be featured in the Tufts Alumni E-Newsletter, which goes out monthly. All events will be posted on the [tuftsalumni.org](http://tuftsalumni.org) calendar page. Tufts will establish a registration page for each event, whether it's free of charge or requires payment, to track expected attendees.
- 6) **Plan it.** Work with OAR staff contact to secure venue, manage catering options, send out communications, monitor RSVPs,
- 7) **Attend it.** It's important for volunteer leaders to attend events sponsored by their groups. Events provide an opportunity for volunteer leaders to meet other alumni, cultivate potential new leaders, and represent their constituency.
  - a. At events, OAR will provide nametags, sign-in sheets, banner, and giveaways at no additional cost. When possible, an OAR staff member will also be in attendance.
- 8) **Evaluate it.** Feedback is important to TUAA and OAR. Share with us your feedback on how the night went. Equally as important, follow up with your friends and fellow alumni to hear about what they thought of the event. For a lot of events, OAR will send a Survey Monkey post-event survey to event attendees requesting additional feedback.

### **Budget**

Each official chapter of the Tufts University Alumni Association is allocated a budget for each fiscal year, which runs between July 1 and June 30. Budgets vary from year to year. In FY11, the average budget for official Shared Interest Groups is \$2,000, with some groups receiving more and some receiving less. Additional funding may be available for your group if requested, though it's not guaranteed.

## **VI. VOLUNTEERS: NEEDS, RESPONSIBILITIES, EXPECTATIONS**

Tufts Alumni is looking for alumni who volunteer to advance Tufts and its alumni body. We seek motivated, reliable people who will maintain good communication with fellow alumni and the staff in the Office of Alumni Relations. Most importantly, besides actual skills that make a volunteer effective and helpful, you must love Tufts and be willing to “work” on behalf of the university to be a Tufts ambassador. As a volunteer, you inherently assume responsibilities as an extension of the University, helping to promulgate positive goodwill and create connections. How hard is that? It’s not hard, but it’s rewarding. Volunteers should learn from their roles and should be able to use their Tufts alumni volunteer experience in future professional settings.

On the next two pages you’ll see a sample job description with expectations and responsibilities for Shared Interest Group steering committee volunteers. Tufts has high expectations for its alumni volunteers, and we hope volunteers have high expectations for themselves.

*In addition to the expectations outlined below, Tufts hopes you, as an engaged alum of the university, will consider making a financial contribution to your alma mater every year—in any amount. We are grateful for your contributions as a volunteer, but there are additional ways in which alumni can contribute to and engage with Tufts that are important to the future of the university. You can make a gift to Tufts by visiting [giving.tufts.edu/givenow](https://giving.tufts.edu/givenow).*

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VOLUNTEER JOB DESCRIPTION FOR:

# TuftsAlumni

## Shared Interest Group Volunteer

### **Volunteer Responsibilities & Expectations:**

Volunteers manage shared interest groups by creating the mission and goals for the organization, recruiting steering committee members for the group, launching marketing and outreach efforts, developing the organization's structure and operating procedure and identifying opportunities for events and outreach. Volunteers also initiate methods of ongoing communication with alumni members, non-members, and current students to ensure the vitality of the group. Steering committee members are also encouraged to create special projects and opportunities that benefit their group and Tufts Alumni.

- Work with other steering committee members to create strategic vision of the group, keeping in mind both short- and long-term goals and opportunities;
- Plan at least one alumni engagement event per year anywhere in the world;
- Leverage personal and other Tufts networks to continually grow membership base of group;
- Maintain ongoing communication (via email is fine) with staff in Office of Alumni Relations (Alumni Relations Officer – Shared Interest Groups) to ensure common understanding of goals, plans, and needs;
- Rely on Office of Alumni Relations and Tufts Alumni for guidance, support, advice, and resources;
- Evaluate one-time and ongoing events to assess their impact and purpose;
- Wisely manage financial resources allocated by the Tufts University Alumni Association throughout the year;
- Serve as an ambassador for your group, Tufts University, and Tufts University Alumni Association at events and outside of formal Tufts functions.
- Volunteers are expected to make every effort to attend events that have been planned by their respective group, chapter, committee, etc.
- Volunteers are encouraged to make an annual gift--of any size--to Tufts.
- Leaders of these organizations are expected to take part in and contribute to the development of succession plans for their respective group, chapter, committee, etc.
- Please notify your Alumni Relations staff liaison immediately if you are no longer able to participate as a volunteer or if you need to take a leave of absence from your volunteer duties.

The time commitment is approximately two to four hours per month, depending on group's proposed plans for the year. Most work is done via email. In-person meetings and conference calls are rare. Steering committee members are expected to attend the group's in-person events.

### **Term of Service:**

Steering committee members typically serve a two-year term, however, most serve for two to four years. Members of the steering committee are also expected to continue to recruit potential successors and other members of the group's leadership.

**Program Description:**

Alumni Shared Interest Groups (SIG) at Tufts are domestic and international communities of alumni that share a common affinity based on shared experience, identity and background, organizational or academic affiliation, profession, or other Tufts-related interest. Shared Interest Groups provide a tangible way for Tufts to identify and engage alumni in the life of the university and its alumni population through events, communications, and shared networks. Membership in individual groups based on shared culture, identity, and profession is open to any member of the Tufts community. For more information about Tufts Shared Interest Groups, visit <http://tuftsalumni.org/connect-with-alumni/shared-interest-groups/>.

New members of the steering committee are recommended by other members of the current steering committee. Nominees are asked to speak with at least one professional staff member in the Office of Alumni Relations to ensure a positive and productive working relationship.

No special skills or experience are needed – just a love for Tufts and an interest/experience in connecting people to each other and back to your alma mater is essential. Other helpful, but not mandatory, skills include: strategic planning, event planning, logistics and organizational skills, marketing/communications/social media, creativity.

**Staff Support:**

- Serve as an advocate for the success and well-being of individual Shared Interest Groups, their volunteers, and members
- Encourage strategic thinking and planning to maximize the impact of individual groups
- Recognize volunteers and their work through formal TUAA awards programs and through additional volunteer and other recognition opportunities
- Your staff liaison will provide training materials or one-on-one training, as needed.
- Your staff liaison will schedule meetings/conference calls according to your group's availability and the will make certain that agendas/minutes are distributed in a timely manner.
- Your staff liaison will oversee any and all logistics for mailings, blast emails, event calendar postings, event registration sites, etc. as it relates to the events or activities of your volunteer program.
- Your staff liaison will provide support to your group when planning events which may include assistance with venue selection, catering, AV needs, guest speaker(s) confirmation, registration, etc.

**Contacts:**

For more information, please contact Shane Dunn ([shane.dunn@tufts.edu](mailto:shane.dunn@tufts.edu)) or Julie O'Connor ([Julie.O\\_Connor@tufts.edu](mailto:Julie.O_Connor@tufts.edu)) in the Office of Alumni Relations.

## VII. APPENDIX

### ALUMNI RELATIONS AND UNIVERSITY ADVANCEMENT

#### *Office of Alumni Relations Staff (as of March, 2011)*

Tim Brooks, Executive Director

#### **Outreach and Engagement Team (Reunions, Homecoming, Shared Interest Groups, Student and Young Alumni Programs)**

Tom Williams, A92, Senior Associate Director - Outreach and Engagement

Jonathan Kaplan, A96, Associate Director – Campus Constituencies

Samantha Snitow, A02, Assistant Director – Student and Young Alumni Programs

Shane Dunn, Alumni Relations Officer – Shared Interest Groups

Karen Micale, Reunion Program Coordinator

Julie O'Connor, Assistant Director – Alumni Volunteer Relations

#### **Regional Programs**

Gretchen Dobson, Senior Associate Director – Domestic and International Programs

Brigid Burke, Assistant Director – Regional Programs

Ryan Earley, A99, Alumni Relations Officer – Regional Programs

Sarah Keleher Napoline, Regional Programs Assistant

#### **Alumni Association Administration**

Mini Jaikumar, G97, Associate Director – Internal Operations and Association Administration

Kaleigh Fitzpatrick, A08, Alumni Association Coordinator

Nick Cross, Alumni Relations Assistant

#### **Travel-Learn**

Usha Sellers, J57, G58, Director of Travel-Learn

Loren Austin, A09, Administrative Assistant to the Executive Director and Director of Travel-Learn

## ***University Advancement***

The Office of Alumni Relations operates as a department within the Division of University Advancement at Tufts University. Vice President Brian Lee oversees the division and reports directly to the President of Tufts University.

The Tufts University Advancement (UA) Division is dedicated to advancing the mission of Tufts and supporting higher education through the fostering of relationships that result in goodwill and financial support. UA manages the University's multi-year, \$1.2 billion fundraising campaign, "Beyond Boundaries." Departments within UA include:

- Alumni Relations
- Tufts Fund for Arts, Sciences & Engineering
- Parents' Fund
- Advancement Communications

## ***Shared Interest Group Chapter Application***

### Proposed New Shared Interest Group Alumni Chapter ***Application for Provisional Status***

Thank you for your interest in starting a new Shared Interest Group. Completing this document is the first stage for new alumni groups seeking official Tufts University Alumni Association (TUAA) recognition. Once finished, please email this document to Shane Dunn in the Office of Alumni Relations ([shane.dunn@tufts.edu](mailto:shane.dunn@tufts.edu)). For questions, please contact Shane by calling 617.627.4135.

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**Proposed Alumni Chapter Name:**

**Founding Members/Initial Leadership Team**

Name/Class Year:	Name/Class Year:
Role:	Role:
Address:	Address:
Phone:	Phone:
Email:	Email:

Name/Class Year:	Name/Class Year:
Role:	Role:
Address:	Address:
Phone:	Phone:
Email:	Email:

**Interest of the Proposed Chapter:**

**Mission/Purpose:**

**Goals:**

**How will this chapter support the missions and objectives of Tufts University and the Tufts community?**

**What influenced your decision to create a new alumni chapter?**

**Initial one year plan for the proposed Shared Interest Group**

**Please list potential events (social, educational, career networking) for this alumni chapter:**

**How do you plan to attract alumni membership?**

**Please list potential marketing, outreach or communications methods for this alumni chapter:**

**How many members do you think this alumni chapter will need to attract in order to succeed?**

**How long do you think it will take you to reach this number?**

**What level of funding do you expect to need in order to carry out the plans for the first year? (Please provide some detail here – you may attach a separate document or excel spreadsheet)**

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*Please Note: Upon receiving provisional status as a Shared Interest Group, you will be asked to further consider planning for events, communications, and budgeting.*